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ABSTRACT

Planning coherent, relevant marketing strategies is crucial to the survival of independent education in the United States. This handbook was created for independent school marketers; principals; and development, publications, public relations, and admissions directors. It offers checklists, sidebars, callouts, and summaries that focus on increasing enrollments without sacrificing educational quality. Chapter 1 describes marketing principles for boarding schools. Chapter 2 discusses boarding school enrollment management, survey research, data analysis, and school selection factors. Chapter 3 discusses image making on campus as a marketing strategy. Chapter 4 analyzes collaborative school marketing. Chapter 5 deals with two tools of promotion: (1) publications and printed matter, and (2) audiovisual marketing. Chapter 6 reviews advertising as part of a marketing program. Chapter 7 considers the role of publicity in marketing boarding schools. Chapter 8 is a case study of one school's approach to designing a marketing program. A marketing consultants' resource list is also offered. (JAM)

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The New Marketing Handbook for Independent Schools

Boarding Schools · 18 Tremont Street · Boston, MA 02108

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Introduction

The Prophets of School Marketing

We in the independent school world take pride in the fact that our contribution to society is not reckoned on balance sheets but rather in the lives of those we educate. Yet we also know that by failing to attend to the *business* of education, we risk not only the quality of our schools but ultimately our ability to educate at all. The almost religious fervor with which we are embracing marketing techniques is evidence of how much tougher our business has become in this era of 'birth dearth' and declining enrollments. With just under 80% of the typical independent school budget derived from tuition, threats to enrollment are threats to our existence.

Among those who first recognized marketing's crucial role in the survival of independent education was Tom Wilcox, founder of Boarding Schools and currently head of Concord Academy. The second prophet of marketing was Marjo Talbott, who succeeded Tom as director of Boarding Schools and simultaneously headed NAIS's Admission and Financial Aid Services. Among Marjo's most significant contributions was the original edition of this book. With the inspired collaboration of publications consultant Carol Cheney, NAIS Public Information Director Anne Rosenfeld, and Assistant Director of Boarding Schools Olive Long, Marjo created the first specialized handbook for the independent school marketer. Although she doesn't credit herself with the ability to see around corners, the unabated demand for the *Handbook*, the enthusiasm of its readers, and the issuance of this second edition all prove her prescience.

The Most Important Lesson: Learning to Work Together

Of the many valuable marketing lessons offered by our authors, perhaps the most important is that we can no longer afford to work compartmentally. Initiative, ideas and data most flow not only up and down the hierarchy . . . but also *across* it. If the walls between our offices, the titles after our names in the catalog or the head's hierarchical management style discourage joint endeavor, we are not marketing as well as we must. Whitty Ransome expresses this point most convincingly when she writes of enrollment management as a concept that "cuts across and links diverse areas within a school, stressing interaction among departments, divisions and constituencies" and "brings together often disparate functions of admission, financial aid and pricing, research, retention, curricular analysis, image and promotion."

About the Format

"Some books are to be tasted, others to be swallowed, and some few to be chewed and digested."

Francis Bacon
"Of Studies"

As we developed the new *Handbook's* format, Carol Cheney and I tried not to forget that the marketing hat is just one of many worn by our overworked readers. Updating Bacon's book/food metaphor, we hope that this *Handbook* will be judged at least a nutritious snack and at best, a smorgarsbord. Checklists, sidebars, callouts and summaries are designed to enable busy school heads, directors of admission, development, public relations and publications to ingest a lot of useful information in a few minutes.

For readers with a bit more time—such as NAIS workshop

participants or those who undertake their own professional development—this *Handbook* may be worth "chewing and digesting." Its overview of marketing theory and technique plus the wealth of practical examples will reward thorough study.

Words of Gratitude

Just about the time the original *Handbook's* third printing sold out, I realized that independent school marketing was evolving so quickly that a new edition was unavoidable. Conversations with the experts whose wisdom I sought to encapsulate encouraged me. Yes, they would sacrifice part of their precious vacations to write or rewrite chapters, and yes, they would accept the paltry payment my nonprofit budget allowed. But manuscripts do not a book make; I knew there was just one person capable of turning them into a clear, coherent and attractive work . . . the same person who had edited and designed the original *Handbook*.

Carol Cheney is that rarest of species in the publishing world—a graphic designer who is verbal as well as visual. She can write and edit as well as she can design . . . which is to say, brilliantly. It is that unusual ability to "switch hit" combined with her imagination, verve and humor that have made Carol the doyenne of independent school promoters. Her skills have shaped the publications of over 70 independent schools as well as dozens of other nonprofit clients. Carol's influence ripples beyond the pages of her publications thanks to her generosity in appearing at workshops and training sessions for NAIS and regional independent school associations.

My thanks to Carol for editing manuscripts on weekends and late at night, for trekking from New Haven to Boston, for enduring my continually evolving ideas of content and appearance (and for answering them in kind!), for rewriting her own chapter—in short, for doing the best job imaginable.

Further thanks are owed to Mary Lathrop Will, Associate Director of Boarding Schools and to Bessie Cromwell, our administrative assistant. Virtually every word you will read passed through Bessie's fingertips on its way to the Macintosh and the typesetter. Those that didn't were input by Mary who additionally contributed a fine chapter on her area of special expertise—collaborative school marketing. Both women proofread endlessly, catching not only the typos but also the "thinkos" that tight deadlines spawn in profusion.

My final thank you goes to The Committee on Boarding Schools and its capable and affable Chairman Jon O'Brien. This group of educator-marketers have given me not only the freedom to pursue projects such as this *Handbook* but also the guidance to make sure that each one serves the needs of those who underwrite it.

Rick Cowan
Director, Boarding Schools
October 1987

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Chapter 1

Marketing Principles for Independent Schools

Marjo Talbott

Introduction

Since the mid-seventies, virtually every independent school conference has included sessions on marketing, public relations or other school outreach programs. Terms such as market segmentation, enrollment management, strategic planning, pricing product life cycles and segmentation have been bantered about increasingly in independent school circles. More and more, schools hire consultants to help audit their admission operation, develop video shows to send to interested families (costing anywhere from $15 to $95 thousand), study the demographic shifts in their communities and create programs which attract families new to their schools (such as extended day opportunities and enrichment classes). One parent even gave a private high school in Louisville, Kentucky, space on a billboard to run an ad which now appears in five different locations around the city. (See Chapter 7.)

Today, most market consultants who work with nonprofit organizations suggest spending 2-3% of an operating budget on marketing programs.[1] However, few schools come close to approaching this allocation. In fact, in spite of the above trends, some heads, trustees and faculty are wary of such investments of money. A number even question the relevance of applying business school concepts to educational institutions.

There still are misperceptions of the basic tenets of marketing theory and apprehension over losing the basic human ingredients which define school life if marketing elements are incorporated into the institutional structure. It is the goal of this handbook to dispel the myths and address particular needs of independent schools.

A Case For Public Outreach

Before exploring aspects of marketing theory, one first must answer the question: "Why do schools seek exposure in the first place?" The obvious answer is that almost everything independent schools need in order to exist comes from others. They depend on students, who are supplied by families with school-age children; they depend on favorable zoning and tax advantages offered by legislators; and they depend on the community's confidence and good will, especially if anything goes wrong on campus. Schools, both individually and collectively, are increasingly aware of their role of ensuring that the public is comfortable with, if not wholly committed to, their services. To meet this objective, schools need to demonstrate that they are important and unique educational resources. They have to *help* shape public opinion and nurture the relationship between community, legislators and foundations.

This is no easy task. Even in the best of times, favorable newspaper articles often include some negative inference about independent schools, alluding to the students as "preppies in cords" or to the campuses as having "country club atmospheres." Over the past few years, there has been a fair amount of unwanted exposure in the news. Reporters seem hungry for scandals that occur in the "ivory towers," whether it be a tragedy with drugs, violence or teenage sex.

Too often one hears independent school faculty members apologize for working where they do—a teacher will say, "This school is unlike other prep schools. Our students are normal children from average homes, unlike at X Academy." The notion of college preparatory education is still being trivialized, shifting from the IZOD alligator to the Yuppie couple with a

Volvo and two children in private school.

It is not difficult to understand why many Americans are either unaware of, confused about or even antagonistic toward our breed of education. First of all, private schools educate only a very small proportion of the total school-age population. They make up only 10 percent of the elementary and secondary scene, and the independent school subset educates only one-tenth of that private sector. It is only human nature to be wary of something that is little known.

These are some recent statistics from the National Center for Education Statistics.

- ***Total number of school children in the U.S.: 45.0 million***
- ***Number of children in nonpublic schools: 5.7 million (12.7%)***
- ***Catholic school enrollment as # of total nonpublic school enrollment: 56%***
- ***Total number of schools in U.S., (public and private): 109,700***
- ***Number of nonpublic schools: 27,700 (25.3%)***
- ***Number of Catholic schools/ enrollment: 9,700/3.2 million***
- ***Number of "other affiliated" schools/enrollment: 10,000/ 1.4 million***
- ***Number of non-affiliated schools/enrollment 8,000/1.2 million***
- ***Enrollment at NAIS member schools is 347,987, or .8% of the total U.S. enrollment***

Further, most independent schools are referred to as being private, rather than independent. The word itself conjures up images of snobbishness. Recent books such as *Preparing for Power: The Elite Boarding School* reinforce this damaging portrait. In addition, the fact that our minority populations have stayed relatively small and unchanged for the past few years does not help the perception. People feel uncomfortable with any "club" which may not admit them. Public schools, in contrast, are integral to the national heritage; they relate openly to everyone, and no one is excluded. Education of a child outside the public system may be viewed as unpatriotic, an attitude particularly prevalent outside New England. Although the government reports of the early '80s wagged their fingers at public sector, and some even pointed to the private schools as a panacea (an academic mecca which never abandoned the basics, continued to incorporate moral education and maintained high standards and good college admission records), the pendulum seems to have swung back.

Public schools are defending themselves. They have established their own recruitment and public relations offices, magnet programs for the gifted and extended day options for elementary school children with working parents. Many families who might once have considered private education as offering more choice now see the public schools as responsive to their needs. The fact that the Supreme Court ruled in 1986 that public school officials have greater power to discipline students is another signal to many Americans that public schools are in control of their programs. Thus, independent schools must work hard at defining what they have to offer as being of value and being different.

Another problem facing our schools is the fact that the number of high school students will drop steadily until 1992. According to the National Center for Educational Statistics, the number will fall by 10.6% in the next three years.[2] In fact, current seventh, eighth and ninth grades have the least number of students. As ISM (Independent School Management) noted in *Ideas and Perspectives*, "This is the 'trough' that is progressing through the grades. As the trough pushes into the high school years, it coincides with the private-independent school grade levels that traditionally are expected to expand (or fill) with incoming students. Thus, in the fall of 1987, at the point that independent schools with upper divisions expect large numbers of applicants, there will be the smallest potential applicant pool in years."[3] A Boarding Schools survey recently confirmed these predictions, noting a 2% decline in inquiries, and 8% decline in visits and a 7% decline in applicants. SSATB test takers also were fewer—a 14.2% decline in two years (a 17.5% decline in New England).

Financial constraints also are becoming more and more of a critical factor. In the past, some families decided to find a way to manage elementary and high school tuitions, hoping then to qualify for the more accessible financial aid packages offered by colleges. With tightening government regulations on college loans and scholarships, parents no longer can depend on such relief.

Although all these factors should be considered as serious warnings, independent schools have been able to maintain their overall student populations as well as continue to offer quality education. They have supported a number of national public information programs, sponsored by various service associations such as NAIS, Boarding Schools and SSATB. In fact, these organizations now see that one of their most important mandates is to help shape public perception and encourage consumers and legislators to view independent schools as significant educational resources, rather than drains on the community, "siphoning off top students from the public system." They have developed programs aimed at convincing people that independent schools are accessible to families who would like to be served by them, regardless of racial or economic background.

Although the collective efforts by national organizations are important, it is equally essential that each independent school shape public opinion by communicating its strengths in its local area. But how does a school accomplish this task? One effective method results from examining and adapting some of the general tenets of the "marketing theory" developed initially by the business community some 25 years ago, adapted by many colleges and universities in the '70s and more

recently incorporated into the work of heads, admission directors and development officers at some independent schools.

A Basic Definition

Taking from Philip Kotler of Northwestern University and other experts, marketing consists of a proven set of concepts and practices designed to increase the effectiveness with which organizations relate to their publics. Sometimes it is confused with or thought to be interchangeable with "selling," although it involves a much broader theory. Simply stated: selling focuses on the product, not on the needs of the buyer.

Marketing in contrast, *begins* with an understanding of the expectations of the consumer. The basic precept of the theory is that a product (or institution) will be able to advance its mission by taking into account the interest of its actual and potential clients when developing program and policy. It focused first on the customer's point of view, hoping to merge consumer interest with institutional strengths.

Marketing is a systematic approach to develop and maintain a mutually beneficial relationship between the product and the consumer. The first step is to analyze the needs and desires of the target audiences; then develop and implement programs which are attractive to the audiences; and finally devise a thoughtful plan of action to promote these programs. The *last* stage of marketing, therefore, is public relations, not the first.[4]

Adaptation, Not Adoption

Although many marketing concepts can be applied effectively to educational institutions, schools should not assume that all of the principles outlined by corporate marketing professionals relate effectively to them. Schools by their very nature have different attributes and responsibilities from those organizations that are in business to produce profits. It is important to extrapolate from marketing practices used by the business world those techniques which are relevant, and then adapt them to each school's particular situation.

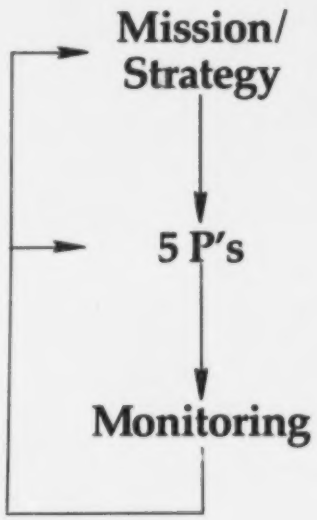
As defined above by the corporate community, marketing is, in its purest sense, an approach that focuses on the needs of the consumer and creates and/or presents to the consumer a product that he or she wants. Thus, strictly speaking, the consumer is *sovereign*—his or her desires dictate the form of the product. It would be unfortunate for a school to derive its program from such a principle.

Instead, as outlined in *Applying Market Research in College Admission*, a book published by The College Board, educational institutions should consider a variation on the corporate model entitled "Academic Marketing":

> *Commercial marketers study consumer behavior with an eye to the consumer's desires as these can be developed by exposure to the product or to the advertisements for it. The admission officers at a selective college that aims at more than survival, when guided by academic market research, can learn where it is feasible to try to persuade students to consider what they want on graduating from high school, and to show them that the college is responsive to their needs but not slavishly obedient to their wants.*[5]

More simply stated, college and independent school policy makers have an obligation to be responsive to the public's need (i.e. quality of education) but not change their programs on the basis of student whims or passing desires.

Marketing Model



Developed by Lynn Oppenheim, Wharton School of Business

MISSION/STRATEGY

- Clear definition of organizational objectives and approach to service
- Share goals within the organization
- Clarity of objectives to external constituencies

5 P's OF SERVICES MARKETING

- **Product**/services—what we provide
- **Price**—What we charge (in several currencies)
- **Place**—Where we deliver services
- **Production**/Delivery—How we deliver services
- **Promotion**—How we let members know about what we provide

MONITORING

- Knowing how to tell if a job is done
- Keeping in touch with the members of emerging needs and issues
- Using information from the environment to reshape the 5 P's

The Market Mix

In the case of independent schools, the product is the school itself—its classroom and nonclassroom activities and programs. The consumers include the general public, actual students and their parents, alumni/ae and the faculty.

A major tenet of marketing is that in order to improve the relationship between a product (the school) and its consumers (students, faculty, etc.) a marketer can alter five basic elements:

1. The nature of the education offered by the school
2. The cost of its form of education
3. The school's availability to various people
4. The school's methods for informing people of its services and
5. The school's ability to deliver what it claims to offer.

Using business school jargon, these five ingredients compose the market mix and often are referred to as the 5 P's—product, price, place, promotion and performance. Independent schools often have altered aspects of the marketing mix even if the terms have not been used.

The Product is a school's academic and nonacademic program and usually is defined by the school's stated mission. Almost annually there are minor adjustments—a school ceases to offer Latin and, instead, adds Spanish to the curriculum. Or a school decides to increase its arts offerings and add a social service requirement in its upper school. Periodically there are more drastic changes—a girls' school becomes coeducational; instead of having only secondary grades, a school adds kindergarten through sixth grade.

The Price of a school usually is determined by tuition, which changes annually. Often, however, it is different for various market segments. In order to attract a variety of families from different socio-economic categories, business managers and financial aid officers might offer financial aid, loan or scholarship programs and create payment plans. The actual cost of educating a student and the amount of tuition charged also relates to institutional resources, particularly endowment income. Therefore, in recent years, schools have substantially expanded their fundraising efforts in order to reduce the school's dependency on tuition income, and thus reduce the price for their consumers.

The Place, or campus sometimes is literally relocated. Some schools have moved at least part of their campus from a recently built-up area to more open space—Holland Hall (OK), University School (OH). However, such moves are not commonplace and are certainly expensive. More often schools can address the issue of location in terms of public perception rather than actually moving the school. Schools make themselves more accessible through bus services and better directional maps and signs.

The Promotion, usually handled by the development and admission offices, has become a much more effective tool for schools over the past few years. Instead of one catalog, schools have considered a number of different pieces—viewbooks, small brochures, and even videos. Later on in this chapter (and more comprehensively in subsequent chapters), various promotional options will be explored.

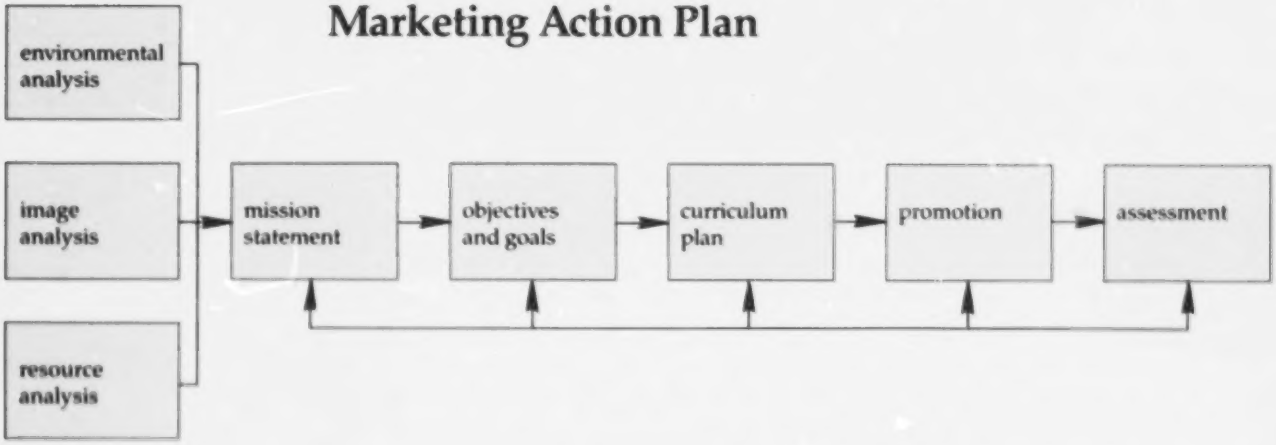
Production Delivery, the recently added fifth P in the marketing mix, refers to how well the school actually comes across with the services it promises. It is crucial that claims in the recruitment materials not lead to an enrollment under "false pretenses." A school must be able to meet a family's expectations, be those regarding class size, quality of teaching, participation in sports or extracurricular activities, or run the risks of disenchantment, ill will and withdrawal.

Market Research

In order to effectively manipulate the market mix, a school needs first to go through a systematic process of analysis and planning. It makes sense not to fix something until it is known to be broken. In the same vein, a school should make changes only after it understands its present strengths and weaknesses and its clients' expectations. In addition, a school needs to develop a definite plan for future directions before telling *potential* parents, teachers and donors about the school. Thus, in advance of spending precious school resources on catalogs or videos, the school trustees and head must undertake *market research*—an examination of assumptions and a testing of both experience and intuition. (See Marketing Action Plan schematic on page 9.)

Many schools have a large body of researched information at their disposal even before doing an elaborate market research project. Unfortunately, this information is often seen by only a few people and is underutilized. For example, a capital campaign feasibility study offers perceptions from alumni/ae, parents and influential friends of the school, but may only be reviewed by the development office. A ten-year evaluation document often is a rich source of information, but only the visiting committee takes the time to read it in its entirety. Thus, before starting new studies, the school leaders should make a careful inventory of what already is on hand.

In addition, whether various members of the school community orchestrate the market research or the head hires an outside consulting firm to complete the process, it is important to keep in mind that no aspect of planning and implementing a marketing strategy will be effective without the support and cooperation of the academic component of the institution. This is the case because the faculty are the closest to the educational process and must be enlisted for their insights, suggestions and information in all phases of marketing. They will have to live with the end results of the exercise. There are too many examples of how sound "marketing" proposals failed because faculty were ignored and then refused to carry out the program. They sabotaged the plan, not out of belligerence but because it contradicted their basic reasons for being affiliated with the school.



Understanding the Environment—After determining who should be on the committee to consider research, the school's next job is to identify and discuss major shifts and influences occurring in American society in general and in the school's particular geographical location. By attending national conferences, studying demographic reports and so forth, the school may learn such vital facts as: most families will only consider traveling one day to attend a boarding school or one hour to a day school; only half as many students today are scoring in the high reaches of the SATs as compared with a decade ago; the discretionary income per family is increasing with the number of American family units decreasing, and the average number of children in each of these units is down to 1.02 (1980) from 2.2 (1965).

The school may also discover that, in its immediate area, the Hispanic population has grown 110% in the last 7 years; that the school's competitor has instigated a loan program to middle income families; that, due to the AIDS epidemic, it may be increasingly difficult to find coaches for contact sports (like wrestling); and that more and more parents expect a school to provide after-school programs to accommodate their full-time job schedules. With these insights, the school leadership can begin to analyze how effectively the school's educational practices train students to cope with the demands beyond the school's confines, as well as what the school's position seems to be in the setting of the marketplace (how it compares to similar schools in the region).

Conducting an Image Analysis—The school then tries to reach an understanding of how it currently is perceived. It conducts an image analysis, often spearheaded by admission and development officers, using questionnaires to ascertain the school's reputation among all of its constituencies—parents, faculty, students, alumni, trustees and friends (see Chapter 2 for a more detailed description of how to conduct surveys). A school may learn that there is a strong consensus on the nature of the school, but that public perception does not reflect reality. Perhaps major changes have taken place internally, but the marketplace still views the school as it existed a decade ago. One marketing rule of thumb is that it takes five to ten years to change a product's image, especially one so little known or understood as that of an independent school. Only if a major crisis hits or scandal occurs will people adjust their views quickly.

Studying the Present Clientele—Effective research depends on looking inward as well as outward. In conjunction with defining external pressures on the school and general public perception, a school continually needs to evaluate the present demographics of its student body.

In a survey conducted by Boarding Schools, figures indicated that 43% of the students enrolled in boarding schools are the first in their families to attend an independent school, and the percent of working mothers grew from 33% in 1976 to 47% in 1982. It is important to know why a family chooses a school. If it is to escape the poorly run public middle school, the family may be planning to return to the public school system in the ninth or tenth grade. Applicants seem to be shopping around more these days; last-minute decisions to withdraw from enrollment agreements are more prevalent. Schools must be prepared for these phenomena—planning for them rather than just reacting to them.

Just as there should be faculty representation on any marketing team, all teachers should be surveyed on their perceptions of the school. The school leaders should know what motivated these adults to choose education as a profession and this school in particular. If a school has a sense of these reasons, leaders can much better predict what faculty reaction is to present school programs, as well as to possible new ones. For example, if Mrs. Z. decided to work at St. Grottlesex because the average class size was 10, she might balk at an attempt to increase that size to 15, even if it means a substantial raise. If the lower school faculty question philosophically the appropriateness of both parents working full-time, they may fight extended-day proposals.

One of the most important

precepts of marketing, and the one most usually challenged by school administrators, deals with the school tying into motives that the consumer population already possesses. Products, including schools, rarely create motives in people. Schools have changed their programs because of consumer preferences. For instance, the decline of single-sex education was at least partly due to public pressure: the decision to become coeducational was as much a pragmatic one as a philosophical one. The rise of the women's movement certainly had a part in stimulating an examination of single-sex vs. coed education. Perhaps the first few colleges and schools which decided to become coed did so because of their conviction that educating young men and women together made better educational sense than educating them separately. Downstream, however, this sense turned to concern about "cents"; single-sex institutions were losing students to coed institutions. Enrollments fell and fiscal health was threatened. It became a matter of survival to become coed, rather than educational pioneering.

This is not to say that a school must change each time a new trend surfaces, or that the board of trustees must promise students "whatever you want we'll provide." School leaders must understand and uphold the essential soul of the institution—what it believes and stands for. At the same time, schools do need to be aware of what motivates their population to pay $4,000 to $14,000 in tuition each year to educate their young.

In fact, as Joel Strangis, formerly at Sayre School (KY), noted at the 1985 NAIS Annual Conference:

> *You may be able to slip a foreign language sequence or three years of a math "requirement" but ultimately you can't require anything. If a student doesn't like your curriculum, he or she will just quit—either figuratively or literally. And that freedom is, believe it or not, the greatest strength of independent education. The students are there because they want to be!*

In order to evaluate who is coming to a school, it is helpful to survey those who inquire and apply, including those who turn down an invitation to enroll in favor of another institution. Schools that have done such surveys have had an amazingly high return on questionnaires—as many as 80% of the applicants answer the questions (see Chapter 2). Another critical group are those students (or parents) who decide to leave the school early and go elsewhere. An "exit" interview, if done openly and gently, can provide wonderful insights on the strengths and weaknesses of a school.

Using Outside Resources for Market Research—Some schools feel they do not have the staff time or resources to develop their own market research tools. Others may feel that the decision makers may listen more carefully to the "outside expert," even if there is someone on staff who can do the work. And, of course, there is also the possibility that an in-house team may inadvertently build biases into a study, thus jeopardizing the reliability and validity of the results. In these cases, a school turns, instead, to professional marketing consultants to help conduct the studies.

One can hire a management consulting firm with a department specializing in opinion and image analysis. A proposal from such an organization may be broken down into stages or phases of the strategic planning process, such as: 1. conduct research, 2. develop the strategy and plan, 3. implement the plan. For each phase the cost can range from $5,000 to $50,000. A school may decide to hire a firm to do Phase 1—to assess the school's overall image, its perceived strengths and weaknesses by the outside community, how closely these external perceptions match views held by analyzing the school's mission with respect to the current demands of the marketplace. Phase 2 and 3 are handled by the school. Another avenue to pursue is to engage an organization that almost exclusively serves independent schools, such as Independent School Management in Delaware. The regional independent school association in Massachusetts (ISAM) recently has hired a marketing expert to develop a broad public relations campaign for its entire management.

As already suggested, schools also can use data from studies conducted by firms which work primarily with the school's development office. One type of institutional survey focuses on lengthy interviews with 35 people who can "appreciably influence the institution's future." Questions cover all aspects of school operation, ranging from trustee relations to admission practices, college counseling and curriculum planning. The survey's purpose is to determine the attitudes, and, when possible, the reasons for the attitudes of people who really care about the school. Such a study, however, probably will not explain how to attract nontraditional markets or determine general community opinion outside the school.

In recent years, some admission experts have left their positions at particular schools and have established their own consulting firms. These services, aimed at helping schools assess their marketing efforts in relation to student recruitment, range in cost from $4,000 to $10,000 a year.

There are other sources of help for schools which wish to conduct market research. CASE, the Council for Advancement and Support of Education, has published a handbook, *Attitude and Opinion Research*, which contains a comprehensive bibliography and appendices listing a number of marketing firms and sample surveys.

One major caveat for the school turning to an outside source for help is: DO NOT LOSE CONTROL OF THE PROJECT. It is essential that any aspect of marketing, if it is to be useful, must be "owned" by the school community, not just by the head and the consulting firm staff. The admission and development directors and key faculty members must feel they are an important part of the process. They must feel confident in and not threatened by the people conducting the research.

School Mission—What Business are We In?

The purpose of the research is to allow the school to assess if the present product is compatible with the needs of the marketplace. More specifically, it is to learn what adjustments, if any, need to be made in order to maintain enrollments or attract more students to apply (or to convince more people to give). With data from the research, the board and head can assess whether or not the school's stated mission reflects the public's image of the institution and attends to the present and future demands of the marketplace. They can determine if the current program meets the abilities and demands of the students and their families today, or if some aspects of the program have become outmoded.

As Robert Grossman wrote in the *College Board Review:*

"Institutions, spurred on by accrediting agencies and other external forces, review their effectiveness in meeting their goals periodically. However, two fundamental queries are often overlooked, taken for granted or treated lightly—the omnibus question of what your actual business is at present and what should it be in the future.

"The railroads are frequently cited as the classic business example of what can happen when you fail to address such questions. Instead of recognizing that their future was in providing transportation for passengers and freight through whatever means were or would be suited for these tasks, the railroad magnates opted for a restricted product orientation. Myopically, they thought that by focusing primarily on building more and better railroads, they would maintain their dominance in the transportation field. After all, they thought, 'the world will always need railroads, right?' Wrong! The railroads were surpassed by visionaries and entrepreneurs who saw the possibilities of improving upon existing modes of transportation.

"Colleges and universities (and independent schools) can learn from the railroad industry's experience. They must imaginatively address the question of what business they are in. They need to remember that just as 'when you're hot, you're hot,' 'when you're not, you're not!' A decision to remain static, no matter how steeped in tradition your institution may be, is a ticket to potential disaster."[6]

Thus, with the help of school wide research, the school leaders begin to answer the following questions:

- What business are we in? (college prep, elementary education, moral development, family counseling)
- Who are our customers? (5 to 12-year-old students within a 30 minute radius)
- Which needs are we trying to satisfy? (college entrance, day care problems, computer literacy, sex education)
- On which market segments do we want to focus our recruitment efforts *this* year? (motivated students, football players, minority families)
- Who are our major competitors for students, for voluntary contributions? (the local public school, the parochial school, national boarding schools, the museum, Red Cross, Planned Parenthood)
- What competitive benefits do we want to offer our target markets? (exceptional campus, early hours, housing 24-hour faculty, small classrooms)

By answering these questions, the trustees can assess the present stated mission and, if necessary, refine it in order to identify accurately the school's present character and future goals. Articulating the essential personality of the school in a concise statement gives the school's leaders, as well as the consumers, a sense of the specific objectives the school expects to achieve. In this process, it is important to keep in mind that the school must be honest and not promise more than it can deliver. For example, it should not be like the company that sells term papers to college students, advertising that its "pre-written" research papers are a "cure for writer's block."[7] In the same vein, schools must be careful not to give the impression that their education is a sure ticket into the Ivy League colleges.

Defining the nature of the school for the public gives the school a healthy position in the marketplace. In order to get the message out, all institutional publications should reflect the school's stated mission in clear and concise language. While this may sound obvious, many schools fail to put their best foot forward in the printed word (see Chapter 5). One example of a very clear and useful mission statement comes from the Bolles School (FL), an excerpt of which follows:

> *The Bolles School seeks to structure its student body so that its composition area is served as closely as possible and practical. Recognizing that geography, economics, and other personal factors play a large role in school selection, Bolles nevertheless seeks to serve as an alternative educational opportunity for the widest range of applicants possible. Efforts in minority enrollment, need-based financial aid awards, and a broad representation of unique talents and attributes are a major commitment in the school's admission functions. In this way, it is our belief that Bolles can best serve not only our community, but our students by providing a realistic and representative setting for their educational pursuits.*

Once stated, the school's philosophy needs to be understood and accepted by the total school population, and the life of the school must reflect its stated mission. For example, a school which defined itself as a 24-hour community should think twice about using a telephone answering machine from 4 p.m. to 8 a.m. each day. A school with a philosophy sensitive to male-female issues should not ask on the application form a recommendation from the "previous headmaster." If a school says it adheres to the

School Scholarship Service formula and has a financial aid program based solely on a family's financial need, students receiving grants should not then be expected to fulfill special standards such as maintaining a C or better grade average. If a school is an amalgamated institution made up of predecessor schools, it must create new, unified promotional materials that represent today's reality.

The Curriculum Plan

Step 4 of the marketing action model on page 9 "Curriculum Plan" calls for the implementation of curriculum and other program changes based on findings and recommendations in the mission statement. Frequently, a curriculum review committee composed of faculty and administrators (and in some cases, parents or trustees) is established to bring the school's educational offerings in line with marketing goals. Schools committed to serving children with a wide range of abilities may add skill-building courses for the gifted. Schools committed to equal opportunities for women and men add reading on women's issues and/or women authors to the English curricula. Schools with growing international and minority student populations may create greater options in their history departments, including courses on Latin American culture, Afro-American history and geography.

At Proctor Academy (NH) the partnership of the admission and development directors has resulted in the school developing a thirty-six month calendar, which includes not only a schedule of all publications but a schedule of review of all areas of school life. The administration and faculty are excited about the continual assessment of all academic and nonacademic programs as they move forward in marketing their institution to potential students and donors. (See the following chapter on Enrollment Management which further addresses curriculum plan).

Opening the School's Doors

Again quoting from Mr. Grossman: "No matter how good your programs and facilities may be, if you don't let the world know about them, you have limited your chances of success."[8]

After completing the interwoven steps of analyzing the present situation and trends, reasserting or redefining a school's identity/mission and making sure that the school's program fits this mission, a school is ready to reach out more and seek new clients. In reality, it should be noted, these processes will go on simultaneously and continuously.

Independent schools . . . need to remember that just as 'when you're hot, you're hot,' 'when you're not, you're not!' A decision to remain static, no matter how steeped in tradition your institution may be, is a ticket to potential disaster.

Schools should explore ways in which they can support the interest of the community at large and open the campus to people not enrolling children in the regular schoool-year program. For example, more and more schools have tied into the public's interest in computer education by offering such night courses as desktop publishing to adults in the surrounding community, or by attracting public school children to summer computer camps. Schools have begun to open their facilities (theater, hockey rink, tennis courts) to the town at night and on weekends. Some have sponsored community wide events such as the Special Olympics, allowed the local country club to use their pool for major meets and offered their campus to companies for family picnics. Others are designated as voting centers or Bloodmobile sites. Whenever guests are on campus, the office in charge of public relations should make sure that school information brochures are placed in conspicuous places for people to pick up.

Many offer programs during the summer which bring a new clientele to the campus. Some of these students may be potential candidates for the regular academic program, or have siblings or friends that would be. Mailing lists of participants in summer programs should be compiled, and those families should receive information about school. Information pamphlets should, of course, be available on campus for pick-up and/or formal distribution during the summer session(s).

Some schools have cosponsored with their public school counterparts science, art and craft shows. One dean of students organized a ski trip which was open to all the children in the community. Other administrators have initiated speaker bureaus made up of faculty members who are willing to talk to the Rotary, PTA, Kiwanis or other organizations. Administrators and faculty members are encouraged to become active in civic organizations, with the school footing the bill for some memberships. At other places, students are able to register with a school job bank which provides babysitters and gardeners to the local community. One school sponsored a public television show, through which it received excellent, positive exposure in the community.

These special events and programs, on campus and off, make good fodder for publicity. A media relations campaign should be planned in conjunction with each program or special event. Announcements beforehand in the newspaper afterward enhance the positive public relations effects of the event itself (Chapter 7 outlines, step by step, how to orchestrate such publicity).

The Rule of Closeness

Some marketing plans attempt to reach people throughout the entire country. Consider the needs of a major Eastern boarding school, which defines its market as extending across the United States. At the other end of the spectrum is the small day school, which is best off concentrating its energy on those who have inquired about the school on their own. Marketing professionals call this practice the rule of closeness. It is ignored too often by many of our schools. An admission officer can devote so much attention to publishing a piece in a magazine or setting up an open house or wooing an educational counselor that he or she neglects the individual families calling for information or visiting the school. Consider for a moment: How much attention is given current parents and alumni and how much are they involved in the life of the school?

Other questions a school needs to ask itself include: Is there a sign at the entrance of the school easily visible to guests? Are rooms and buildings marked clearly? Is the telephone receptionist friendly, informative and efficient? Do teachers act resentful when their classes are visited by a prospective parent or donor? What do students, teachers, parents and alumni say about the school? How do students conduct themselves during sports meets? Are the buildings and grounds well kept or in need of repair and cleaning?

It is helpful to keep in mind Mark Twain's adage: "You only have one chance to make a first impression."

Conclusion

As sophisticated as independent schools may be in terms of the education they offer young people, most of these institutions are naive about the *business* of education. No longer can schools dwell in splendid isolation, relying on reputation and tradition as recruitment tools. Schools must be recognized as viable institutions with substantial resources to offer—in program, facilities and people power—if they are to gain the understanding and acceptance of the constituencies they seek to serve.

New bonds must be forged with the community for a school to ensure its future viability, and resources must be allocated not only to research and assessment, but also promotion. In order to carry out the mission of educating youth, schools must find nontraditional sources of revenue to maintain their stated goals and objectives, or else cut off qualified and desirable applicants by increasingly high tuitions. At the same time, schools must reevaluate their programs in light of social and technological changes during the last few decades, keeping an eye on the future and on what new needs may emerge as America rethinks education in general.

Marketing has been embraced by a number of colleges and even independent schools in the past decade. Today, school leaders can learn from others' successes and failures. They can see that some institutions have attempted shortcuts in the marketing model, ignoring the critical research and definition stages and jumping to advertising without understanding themselves or the marketplace. There are examples of college promotional campaigns which seem too glitzy for independent schools—financial aid grant letters sent in envelopes shaped as dollar bills; a junior college poster of three cute blond girls standing by a sign pointing to Faneuil Hall, Harvard and Bloomingdale's. Some colleges spend as much as $2,200 on marketing for each new student. In fact between 1980 and 1985, college marketing budgets increased 65%.

This handbook is not suggesting such advertising gimmicks nor such major financial commitments. However, one must keep in mind that many private, competitive colleges have been very fearful about shifts in demographics and dwindling student populations. And yet, this past year, almost all of the colleges which independent school students consider for admission witnessed large jumps in their number of applications—Skidmore, Tulane, UVM, Hampshire, Washington University, Emory, Tufts, Colorado College, Oberlin and the Ivies, to name just a few. These colleges feel that their marketing programs have served them well.

Taking time to analyze both the external and internal factors that affect the business of education and to articulate the personality and mission of a school no longer appears to be a luxury but rather a necessity. Marketing cannot be a one-time event, but rather an ongoing process with a built-in mechanism of evaluation, assessment and review. Continually, school leaders must take a litmus test of the validity of the school's mission statement and analyze whether the stated goals of the school are translated accurately into academic programs. Schools also must evaluate their promotional pieces and determine whether they are getting their message out often, clearly and loudly.

The next sections of this handbook address ways in which schools can develop their own research instruments, improve their classroom and nonclassroom programs, and communicate with the public through publicity, advertising and school publications. Reaching out to the community, sensing its needs and matching institutional strengths with its interests requires creative thinking and what initially may seem to be a lot of extra effort. But it is work well worth it.■

1 Education Week, "Private Schools Honing Their Promotional Skills," Feb. 25, 1987, pp.1 & 15.

2 *Ibid.*, p. 14.

3 Ideas and Perspectives, Vol. II., No. 12, Oct. 27, 1986, p.1.

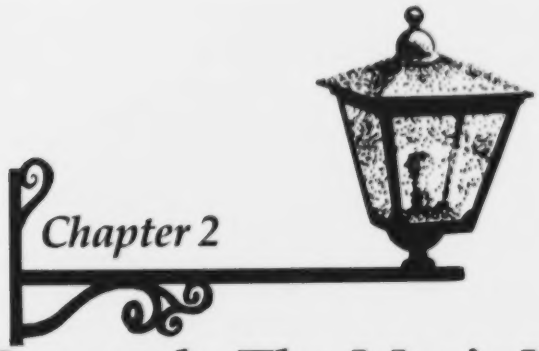
4 These ideas are based on Philip Kotler's work, Marketing for NonProfit Organizations; Englewood Cliffs, New Jersey; Prentice-Hall, 1975.

5 *Applying Market Research in College Admissions* by Larry H. Litten, Daniel Sullivan and David L. Brodigan, College Entrance Examination Board, 1983, p. xvii.

6 Grossman, Robert J., "Marketing: Key to Institutional Survival and Success," *College Board Bulletin*, Spring, 1987, pp. 17 & 32.

7 *Quarterly Review of Doublespeak*, Volume XIII, No. 1., Oct. 1986, p. 3.

8 Grossman, *op. cit.* p. 15.



Chapter 2

Market Research: The Magic Mirror

Part I Enrollment Management: The Next Wave

Whitney Ransome and John Maguire

Just as independent schools are becoming increasingly comfortable with the once dreaded term of "marketing," a new and equally important concept is making its way down from the college and university world: enrollment management.

Enrollment management describes an organizational system which supports the coordination of all activities associated with the enrollment process. It brings together often disparate enrollment-related functions, having to do with admissions, financial aid and pricing, research, retention, curricular analysis, image and promotion. It is a research-based concept which provides a collaborative approach to enrollment problem solving and planning. Research is conducted at both the beginning and end of the enrollment process, providing critical information for the development and implementation of marketing plans. Enrollment management emphasizes the sometimes overlooked areas of financial aid and pricing, retention and student program preferences to ensure an optimum student enrollment. Enrollment management cuts across and links diverse areas within a school, stressing interaction among departments, divisions and constituencies to make the whole greater than the sum of its constituent parts.

Enrollment management demands a proactive approach to organizational decision making, and is based on six fluid and overlapping goals. The first three complement and/or expand on the key elements of the marketing model explained earlier in this handbook and the last three represent areas not usually viewed as important elements to healthy enrollment.

Goal #1—Admissions/ Marketing:

To develop admissions and marketing programs that will attract the most appropriate students in sufficient numbers to meet enrollment projections.

As this book suggests, marketing should not be confused with hucksterism and slick sales techniques. It is a systematic effort to match institutional strengths with student and parent interests. The starting point for a successful marketing strategy is the development of a long-range plan. Such a plan brings institutional goals and objectives into sharper focus and identifies the specific programs that can best meet those goals. Schools will survive and thrive in direct proportion to the quality of their programs and their ability to identify and attract students whose interests and abilities coincide with those offerings. The foundation of a successful marketing effort lies in the school's faculty and program. The mark of a good admissions operation is its ability to communicate these strengths in a forthright and persuasive fashion to the right segment of the student marketplace.

Goal #2—Pricing and Financial Aid Strategies:

To implement pricing and financial aid programs that will optimize the school's ability to attract and retain the desired academic and socioeconomic mix of students.

Ever rising tuitions, keen competition from public schools and declining numbers among school-age children make tuition setting, financial aid and loan programs—and their appropriate packaging—important tools for reaching enrollment goals. Frequently, tuition aid budgets are set with little or no attention given to how their allocation helps to achieve institutional objectives. Financial aid should attract new students as well as help retain current students.

Goal #3—Research and Centralization of Information:

To create an integrated approach to generating and maintaining important information about the school's various constituencies.

There exists within each school a wealth of information which is all too often "dead-ended" in individual departments or divisions. The admissions, development, alumni, academic and general administrative offices conduct a variety of surveys and gather data on many different topics, but rarely pool this information in a way that can enhance an understanding of the overall school. Research and centralization of information helps a school focus on the students and families it serves and provides data about their interests, motives, needs and wants. Effective enrollment management research identifies and analyzes information about an institution's "messages," "markets," as well as the "media," to link with them. The research should guide future planning.

Goal #4—Retention:

To formalize retention strategies, minimizing attrition by understanding the reasons behind it.

Many schools, even those with a relatively low yearly attrition rate, underestimate the importance of re-enrolling current students. It is easier and certainly more important to retain current students than to find new ones. Formal attention to attrition should begin when a new student sends in the first enrollment agreement, not when large numbers of families fail to sign up for another year. Administrators need to think about how they communicate with families during the time their sons and daughters are enrolled. Too frequently, the initial items a family receives after an acknowledgment of an enrollment agreement are the first tuition bill and the overwhelming summer mailing. This can give an unintended message about the school's priorities.

For some families the decision to leave a school is appropriate. Admission decisions are not flawless, and there are times when risk candidates and choices of the heart are not in the best interest of a child. School personnel need to review these cases periodically to determine why some work out and others don't.

> ***What can be learned from exit interviews:***
> - recurrent attrition themes
> - trouble spots within the school
> - profile of students or families most likely to leave

However, many families who withdraw their children do so for the wrong reasons. Surveys and exit interviews will help schools monitor the perceptions and attitudes of families about to withdraw. Such research can identify recurrent attrition themes; locate "grade breaks" when students tend to transfer out; lead to a better understanding of the types of students or families who are most likely to leave the school and what, if anything, schools can and might do to stem the attrition tide. Of most concern should be the family who says what they found is less than expected. Retention surveys and summaries, as well as the strategies used to minimize these losses, are another part of the research process in enrollment management.

Goal #5—Curricular Analysis:

To monitor and to understand immediate and long-term student and parent interests.

This is the most difficult and potentially most misunderstood of the objectives of an enrollment management program. Recognizing and understanding changes in what families expect from a school's academic, extracurricular and special services can make the difference in its ability to survive difficult times. This does not suggest that faculty should develop curriculum in direct response to student and parent interests. There is a fine balance between resisting momentary fads and responding to legitimately shifting parent and student needs. Information gathered from periodic student, parent and faculty surveys can be used to adjust school offerings in a way that meets a faculty's intellectual goals as well as the perceived needs of families.

Goal #6—Organization for Enrollment Management:

To organize staff in a way that coordinates the flow of information and decision making within the school.

Each school will differ in the choices it makes for coordinating enrollment management functions. Administrative staff groups are usually the best forums for gathering and discussing ideas and data relating to enrollment issues. A number of colleges and universities have created the position of dean or director of enrollment management to whom those responsible for admissions, financial aid, retention, registration and marketing functions report. While this sort of administrative restructuring may not be appropriate for independent schools, enrollment management cannot succeed without such thinking and planning across separate areas of responsibility.

Enrollment management is the next wave on the conceptual horizon. Schools that understand it, make it their own and see the advantages of thinking broadly will thrive during uncertain times. Attracting and maintaining an optimum student body can only be accomplished when a school's mission is clear, its programs are sound and its search for students flows from a commitment to serving families well and honestly.■

Part II What Surveys Can Tell You

Herbert F. Dalton, Jr.

A well-developed research program in an independent school admission office is the horse that can pull the recruitment-marketing cart. Unfortunately, this cart is sometimes placed in front of the horse, or, more often, admission directors end up pulling the cart themselves. When this happens, resources and potential are wasted. The benefits of research are many. Research can inform and direct the marketing and recruitment effort, save money and produce a healthier candidate pool.

One research technique that works especially well for admission offices is the survey, or questionnaire. To explore and learn about this technique, we need to look at:

- Admission-office misconceptions about research
- A research/survey model
- A sample questionnaire
- Sample graphs drawn from questionnaire-generated data
- Analysis of data using simple statistical techniques

Misconceptions

Here are some of the most common misconceptions that keep admission offices from developing research programs.

"It's too complex." Data analysis in admission offices runs all the way from collecting basic comparative figures on inquiries, applicants, and matriculants to using sophisticated multivariate statistical analysis, discused below.

"We're too small." No school that has an admission office is too small to develop and benefit from research.

"We can't afford it." Rather, "We can't afford *not* to develop a research program." Research-based understanding of a school's markets not only produces better results; it can also save money.

"We don't need it." In lean and prosperous times alike, schools contend that research costs too much; lack of research is even more expensive. By collecting and analyzing admission data, the school can see whether and where it is gaining or slipping in relation to other schools.

"We aren't a number-crunching school; we are people oriented." Research doesn't replace the all-important people skills; it enhances them.

Research/Survey Model

The diagram below shows the stages of a typical admission office research program. Because some steps are more self-evident than others, they receive less detailed attention in the text than others.

Determining Questions

As shown in the research/survey model, the first step in developing a research program is to decide which questions need answers. Some questions can be answered by looking at data that may already exist within the admission office, such as:

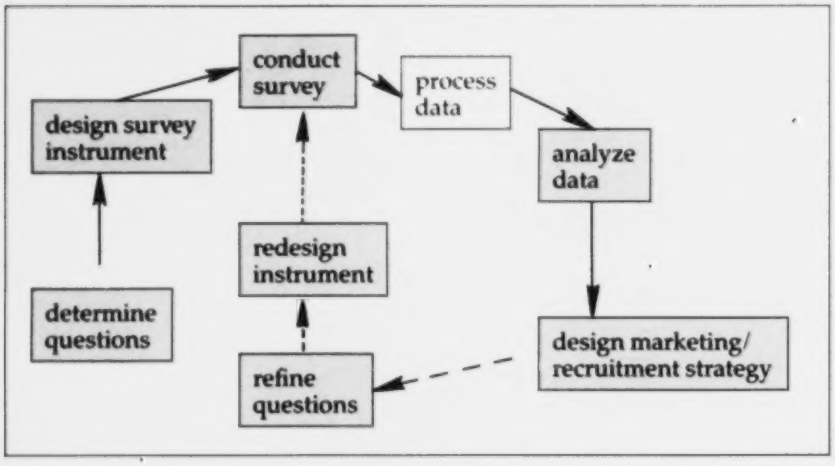
- What direction have the numbers of inquiries, visits, and applications taken in the last five years?
- What is the ratio of inquiries to applications over the same five years?
- How many students did we see on the road this year? How many of these (number, percent) applied and matriculated?

Other questions that cannot be answered readily by internal information are:

- What are the perceptions of current students about the school?
- Do these perceptions support the message the admission staff communicates to candidates and their families?

Once you have asked these questions, you need to turn to some equally important ones whose answers require an external probe:

- What are our sources of students?
- How much have these sources



changed in the last two years? Five years?
- Which schools are now our top ten competitors?
- What percentage of students do we "win from" and "lose to" these schools?
- Why do we win or lose students to each of these schools?
- What role do parents play in admission decisions (applying, matriculating)?
- Do parents differ from students in their perceptions of the school? If so, how?
- What do students consider the most important, second most important and third most important reasons for choosing the school?

Answers to these questions can be found by surveying the various admission constituencies: inquiries, applicants, matriculants, nonmatriculants (those who do not accept admission), parents. The questions focus on three inter-related areas of the admission operation: programs, perceptions and competition.

Program evaluation measures the cost effectiveness and impact of admission strategies. For example, is the school's new videotape a cost-effective recruiting device? How many inquiries have resulted from its use, and what was the cost per inquiry? Evaluation of this sort allows the admission office to replace unproductive programs with more efficient ones.

Perception studies allow the school to measure how it is viewed in the marketplace by people who make inquiry, applicants, matriculants, nonmatriculants and parents. These findings can be the foundation for how the school presents itself to the public and to the community.

Competition analysis measures the school's position in relation to its competition. To what schools does it lose students? From what schools does it gain students? Why? How has this changed over time?

"If we can just weather the storm, the number of 13 year olds will be back where it was in just a few years." Wrong! By the year 2000, the minority population in the USA will more than double, accounting for the ⅓ of the total population in this country. The white, upper middle class, currently the predominant population at America's boarding schools, will not return to the numbers of the mid '70s during our professional lives.

Designing a Survey Instrument

The standard survey instrument, a questionnaire, can be administered by mail or over the telephone. A mail questionnaire generally costs less, has less interviewer bias and offers more confidentiality, but it takes longer to analyze, and the researcher has less control because the respondent may not answer certain questions.

The telephone survey, which falls within the rapidly developing practice known as "telemarketing," tends to provide more reliable data because respondents are unable to look back at earlier questions, and the telephone researcher can make sure that each question is answered completely. Likewise, one can probe for answers over the phone. However, this requires trained telephone interviewers.

Whether surveying by mail or telephone, make the format clear and questions brief and avoid collecting information that will not be analyzed. Whichever method you choose, do everything you can to improve the response rate to make results as representative as possible of your prospective student population. In the case of a mail survey, a professional appearance improves the response rate, as does anything that simplifies the process for respondents, such as a self-mailer or postpaid self-addressed return envelope. A follow-up mailing of another questionnaire should go to those who have not replied after three or four weeks. Both the initial questionnaire and the follow-up should be accompanied by a letter from the director of admission explaining its purpose and soliciting response.

Generally speaking, the higher the response rate, the more valid the conclusions. A 50 per cent return is considered adequate, 60 percent good and 70 per cent very good.

The following typical mail questionnaire is designed for matriculants and nonmatriculants after they have notified the school, designated "Academy," of their decision. With modifications, the survey could include those who have made inquiry, could be used at another stage in the admission process, and could be used as a telephone survey.

ACADEMY
Admission Office
Address
Telephone number

Admission Survey

We would appreciate your taking a few minutes to complete this survey. Your response will help us improve our service to applicants and their families.

Q-1. What type of school are you now attending? (circle one)

a. Public
b. Private coed
c. Private single-sex
d. Military academy

Q-2. When you hear the name ACADEMY, what word or phrase comes to mind?

Q-3. How did you first learn about ACADEMY?

Q-4. Who had most influence on your choice of school? (circle one)

a. Parents
b. Friends
c. Current teacher(s)
d. Current students
e. Other

Q-5. Your current zipcode is

Q-6. Your taxable family income is $

Q-7. Have any members of your immediate family attended an independent school? (circle one)

a. No
b. Yes

If "yes," which ones? (brother, mother, etc.)

Q-8. Please list *in order of preference* all the schools to which you have applied, including ACADEMY. Then, to the right of the name of each school, indicate your answer to the two questions.

	School	*Were you accepted?*			*Offered financial aid?*		
		No	*Yes*	*Waitlist*	*No*	*Yes*	*Didn't apply*
a.							
b.							
c.							
d.							
e.							
f.							

Q-9. Please name the school you will attend or, if you will be attending ACADEMY, your next closest choice:

Q-10. Please evaluate the following admission-related activities for both ACADEMY and the school you named in question 9. Use a rating of 1 (very negative) through 5 (very positive); enter "0" if not applicable.

	ACADEMY (1-5)	*OTHER SCHOOL* (1-5)
a. Attention to me as an individual		
b. Phone contact with admission office		
c. Correspondence with admission office		
d. Admission catalog		
e. On-campus interview/tour		
f. Contact with students at the school		
g. Contact with alumni/ae		
h. Your overall response to admission contact		
i. Your parents' overall response to admission contact		

Q-11. Listed below are nineteen factors that students typically consider in making their choices. Please rate ACADEMY and the school you listed in question 9. We ask that you rate each item; if your knowledge is limited, please make your best guess. Again, use a rating of 1 (very negative) to 5 (very positive), or "0," if not applicable.

	ACADEMY (1-5)	*OTHER SCHOOL* (1-5)
a. Tuition and other costs		
b. Distance from home		
c. Quality of faculty		
d. Size of school		
e. Social activities		
f. Diversity of faculty/staff		
g. Parents' preference		
h. Quality of student body		
i. Attractive campus		
j. General reputation		
k. Academic program		
l. Athletics (facilities/programs)		
m. Location of campus		
n. Dormitories (if boarding school)		
o. Diversity of students		
p. College placement record		
q. Facilities		
r. Availability of financial aid		
s. School spirit		

Q-12. List below the three factors among those listed above—or others—that most influenced your final choice of school.

a.
b.
c.

Q-13. Additional comments.

22

Thank you for your help.

Processing Data

Once questionnaires are returned, the next issue is what to do with the data you have collected. How you process your data depends on how you plan to analyze them. You should decide how you are going to process the data before designing a questionnaire. Schools that do not have the computer capability they need to process data may seek assistance through local colleges and research specialists.

Using our sample questionnaire, let us consider some possibilities for processing data. Questions 1, 5, 6 and 7, containing biographical data, allow you to segment the perceptions (and other information) of different groups of respondents. You can do this by gender, region, type of school, parents' education or any other variable you include in this part of the questionnaire.

Questions 2 and 3, which are open-ended, can be processed with or without the aid of a computer; when analyzing them, you want to look for patterns or recurring themes. The word or phrase respondents used in question 2 to describe the school can be helpful in confirming or developing a marketing vocabulary. Similarly, learning how applicants found out about the school (question 3) can be invaluable to your marketing plan. If you find that a particular source—independent counselors, for example—accounts for more students learning about your school than expected, you may decide to adjust your recruiting strategy. In the case of a school that draws from a large geographic area, you can divide responses geographically to see how candidates from other regions of the country find out about the school.

Question 4 ("Who had most influence on your choice of school?"), which builds on the preceding question, calls for computer support. Information gathered here might well determine a particular marketing strategy. If you find that teachers play an influential role in the school decisions your students make, you may want to target them in your recruiting through mailings, receptions or some other means.

The data gathered in questions 8 and 9 provide the basis for analyzing the competition, much of which can be presented graphically, as in Graph 3, below. Schools assume they know where they stand in relation to their competition, but as they inspect the data, they may find that their assumptions are outdated and inaccurate.

Question 10 looks at your admission effort and evaluates your program. Which components of your operation are most or least effective? Graph 1, below, which provides a summary of this question, may cover concerns you have about how to use and interpret this information.

Questions 11 and 12, dealing with factors influencing students' choices, provide the base for your perception study. Graph 2, below, shows how matriculants and nonmatriculants view the items in question 11.

Quietly we have been getting away with annual tuition increases that double and even triple inflation rates. The dollars are going to catch up with us and this is likely to shrink our market. Fewer families will be able to afford, or just as important, think they are able to afford our product. We need to begin to look at the relationship between cost and product.

Analyzing Data

Techniques exist for analyzing data with varying degrees of statistical sophistication. Summaries of a single variable can be extremely helpful in gathering perceptions of the school and in determining its market position.

Multivariate analysis is another way of analyzing data by comparing several items with one another and determing how and whether they cluster.

Factor analysis, one way of revealing the complexity of school choice, allows you to determine the image of your school as it is perceived by a particular group or set of groups—matriculants vs. nonmatriculants, those from one region vs. those from another.

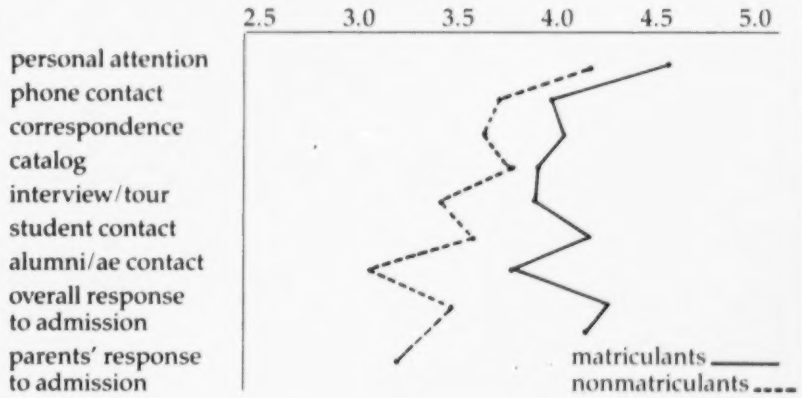
In any case, as you analyze data, keep in mind the fact that matriculants tend to respond in greater numbers than nonmatriculants and adjust accordingly.

Graph 1 charts the effect of admission-related activities. Responses to question 10 are expressed as averages on a scale of 2.5–5.0. Item h. in question 10, "Your overall response to admission contact," is a composite of the first seven items; individually, these seven items allow us to dissect the perceived effectiveness of different components.

Matriculant responses are influenced by the "halo effect," that is, matriculants are partial to the school they have chosen. Differences between groups of respondents are significant only when they are 0.7 or greater. It helps to do a historical comparison of responses to see how groups compare factors from year to year. As you change your admission operation—start an alumni/ae interviewing program, for example—it is important to measure student response.

Looking at item i., "Your parents' overall response . . ." we see that matriculants gave this a 4.2, nonmatriculants a 3.4, which leads us to note that the higher a candidate's parents rate their response to admission contact, the more likely the candidate is to matriculate. Although we cannot assume a causal relationship, it appears that parents are an important barometer for determining what course their child will take. We therefore want to do everything we can to influence parents positively. How are they included in the campus visit? Are mailings sent to them as well as to their children?

Graph 1. Effect of Admission-Related Activities

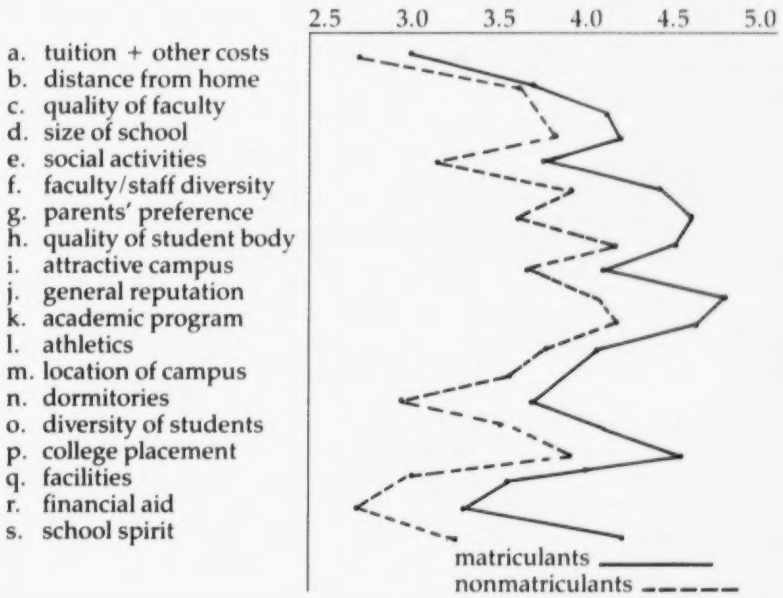


Graph 2, based on the nineteen items in question 11, compares how matriculants and nonmatriculants view different aspects of the school.

In analyzing the data on perceptions, let us consider a few points that deserve discussion. We note here, as we did in graph 1, the halo effect, that is, that matriculants rate every item higher than nonmatriculants. The absolute value of numbers is less important than their relative weighting.

Students rate five items particularly low: "Tuition and other costs," "Social activities," "Dormitories," "Facilities," and "Availability of financial aid." Tuition and financial aid, items that are closely related for aid applicants, receive the lowest rating. Before drawing any conclusions, we need to look at both areas in more detail. How, for example, do Academy's costs and financial aid program compare with those of competing schools? Is Academy deriving maximum benefit from its financial aid program?

Graph 2. Student Perceptions



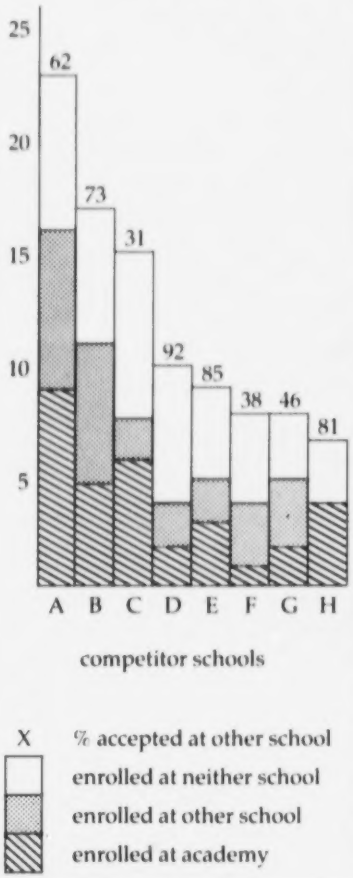
The educational reform movement of the '80s has created a perception of improved secondary public schools that no doubt has encroached on many of your markets. A down economy will be an injection of krypton to the awakening giant.

The low rating given social activities underscores the need to probe further. Are present students satisfied with Academy's social activities? If they are, this needs to be better communicated to candidates. If, on the other hand, students are dissatisfied, maybe Academy needs to address this issue internally.

The low ratings given dormitories and facilities may also present a finding worthy of internal consideration; Academy's trustees and other decision makers should be informed about this. Perhaps it is a minor maintenance problem that could be cleared up with a little plaster and paint; perhaps more is involved, however.

It is also important to look closely at gaps in ratings of 0.7 or more. The largest gaps occur with "Parents' preference," "Dormitories," and "Availability of financial aid." At this point, one might ask whether some of the nonmatriculants would have attended Academy if these gaps had been smaller. To answer this question, we would want to consider responses to question 12, those factors that most affect final choice, as well as other available information. Policy decisions about recruitment and marketing should be based, not on any one response, but on patterns that emerge.

Graph 3. Competition Analysis



Graph 3, analyzing the competition, tells us the proportion of accepted students who applied to, matriculated at, and were accepted by other schools.

The first bar at the left tells us that School A is the institution with which Academy crosses most often for its accepted applicants: 23 per cent of the students who applied to and were accepted at Academy also applied to School A, and 62 per cent of these students were accepted at School A. Of this group, 9 per cent (of the 23 percent) matriculated at Academy, while 7 percent (of the 23 percent) matriculated at School A.

Factor analysis. The six factors listed below help illustrate how matriculants perceive Academy. In their perceptions of the school, matriculants group different items from question 11. (Note that not all items cluster around any one factor and that individual items may appear under more than one heading.) This statistical technique allows us to compare factors of different groups. For example, when we compare factors for matriculants vs. nonmatriculants, we see that the two groups view Academy differently.

Factor analysis can give us insight into how a particular group views our school. We might find, as a hypothetical example, that "Academic program" is perceived as part of "Facilities," and we might learn from this that candidates, especially nonmatriculants, see our tattered classrooms as a symbol of the academic program. Or "Parents preference" might correlate with

RESEARCH

• What we need to measure first is image—how various constituents perceive institutional characteristics. Images determine student and parent choice; they are the reasons students do or do not visit, apply and matriculate.

• The second place research measurement can help is with recruitment. It is essential that we be able to measure the impact of each weapon in our recruiting arsenal. What percentage of our accepted students saw the video, read the catalog or met with an admissions representative on the road? What was the impact of these encounters?

• The third area we need to measure is our market. Which students are we attracting? Where do these students come from? With the need to increase ethnic diversity at most of our schools, it becomes essential that we understand how these key populations view our schools and respond to our recruitment.

• The fourth area we need to measure is market position. What schools do you cross with for inquiries?

1. The advantage of measuring current students is that they are the easiest group to reach. Current students can help us better understand our school's image: how they viewed the school before they came vs. how they currently see it. They can help us better articulate our institutional message. The disadvantage of just measuring the current student group is that there is a bias; we can learn about why students choose but little about why they don't choose our school.

2. The accepted student group lets us know about matriculants as well as nonmatriculants; what students like and don't like about our school. Although there are some very helpful comparisons that can be made between matriculants and nonmatriculants, here again we are still talking about friendly Indians. Both groups are students who liked our school well enough to apply.

3. The inquiry pool is the most difficult group to reach because a large proportion no longer have an interest in our product. While the tip of the iceberg is the accepted student group, the iceberg itself is the inquiry group. Inquiries hold a store of information on your school's image, the effectiveness of your recruitment, your market and your market position. The inquiry group is rarely measured by admissions offices, but without understanding your inquiries, you can't fully understand (and realize) your admission potential.

"Diversity of students" (again for nonmatriculants), suggesting one reason why some students do not matriculate: perhaps their parents view the school as lacking heterogeneity.

Many of the perceptions candidates have of a school occur at the subliminal level. Factor analysis helps us decode the complex and subliminal impressions on which their choices are based.

How Matriculants View Academy: Six Factors

Factor 1. **Reputation**
Parents' preference
General reputation
College placement record
Quality of student body

Factor 2. **Academics**
Academic program
Quality of faculty

Factor 3. **Athletics/social**
Athletics
Social activities

Factor 4. **Ambience**
Size of school
Diversity of students
School spirit

Factor 5. **Location**
Distance from home
Attractive campus
Location of campus
Dormitories
Facilities

Factor 6. **Finances**
Tuition and other costs

Factor 1 illustrates the items that, according to the perceptions of accepted students, compose the school's high-quality reputation. Factor 4 shows what qualities comprise ambience. In other words, an accepted student who sees things this way is more likely to matriculate than one who does not.

Discriminant analysis. Discriminant analysis can be used to indicate the variables that are most critical in the decision candidates make about the school. In the example given below, we see that those who matriculate at Academy consider certain variables to be more important than those who decide not to matriculate, though there is some overlap. The ranking of the variables indicates their relative importance in a decision. The fact that parents are at the top of the list shows how important they are in the decision to matriculate.

Which of Academy's attributes, if altered, would most likely increase yield? The perceived improvement of the five attributes listed under "Matriculants" could be expected to have the largest impact on improving yield. Let's consider one of these attributes, "Location of campus." Obviously the school cannot "improve" campus location, but it can, in its recruitment and marketing, stress positive features of Academy's location of which candidates may be unaware.

Matriculants
Parents' preference
College placement
Location of campus
Athletics
Size of school

Nonmatriculants
Availability of financial aid
Dormitories
Parents' preference
Social activities
College placement

Having been part of both the secondary and college admissions scene, my impression is that many of you at independent schools outdistance those of us at the colleges in the art of our profession. We have a lot to learn from you in the wonderfully personal and caring way you interact with parents and kids. But the art needs to fuse with the science of our profession, and my observation is that many of the colleges have out-distanced you in the science.

Black and Hispanic students represent 10% of the NAIS population, but are nonetheless woefully underrepresented. Our future strength, nay our survival, depends on our accommodating new populations.

Within a shrinking general population, our traditional market is contracting:

Births/ female	*2.1= replacement level*
Cubans	**1.3**
Whites	**1.7**
Puerto Ricans	**2.1**
Blacks	**2.4**
Mexican Americans	**2.9**

Source: Harold L. Hodgkinson "All One System," Institute for Educational Leadership, Inc. 1985

Conclusion

A questionnaire is an ideal way to introduce market research to your admission operation. Analysis of the data gathered by surveying can range from basic averages for different cohorts, or groups, which can be computed by hand, to highly sophisticated multivariate analysis, which requires computer assistance.

These findings in turn inform recruitment and marketing strategy, which, as mentioned earlier, should not be based on any one survey response but on themes and patterns that emerge from the data. Survey findings inevitably point out how intimately the admission office is related to the rest of the school. To improve the position of admission—the school's ability to attract and retain students—requires an integrated approach, which in turn demands the commitment of the entire school.■

Part III School Selection Factors: What Research Tells Us

Sanford Roeser

Since 1983–84, yearlong surveys of admission candidates and parents at 19 independent schools have shown that families are looking for good teachers who will also provide quality, out-of-class time for close support and open communication with students. Parents list the size of classes and the ratio between students and teachers as very important. They also say that qualifications of a faculty are important as is the structure and discipline in a school.

Beyond teaching ability and close relationships with faculty, students are very interested in the variety of extracurricular activities, the college placement record (often listed as more important by students than parents), the student/teacher ratio in the classroom and the extent of social life offered by the school.

It is impossible to plan effective strategies and to conduct productive market programs if a school does not know how it is perceived by a variety of focus groups, especially by those people who visit the school for admission interviews. While there are often a number of reasons why a family will choose one school over another, it is important for a school to know what those reasons are. What factors affect family decisions on the selection of a school? How does the school compare with a family's "ideal"? With realistic knowledge, a school can direct its marketing efforts and influence its admission pool.

In comparing ideal school characteristics with perceptions of a particular school, most of these surveys have pinpointed gaps that have signaled potential problems or misperceptions. Isolating this information has enabled schools to produce effective changes in their promotion or to effect changes within the school. The object of change, almost always, is to increase initial interest in a school, the number of formal applications, and ultimately, enrollment yields.

To be sure, some schools have encountered greater perception problems than others. Often, perceptions do not represent fact. At a number of schools, admission programs have run unchanged for years, more successfully than not (a good reason for no change). However, yields can often be improved by learning more about what the most important clients—those who visit seeking admission—think about independent schooling in general and how they feel about a particular school.

Survey instruments can be developed and used with admission visitors during the course of a year. When there is sufficient data, results can be divided into a variety of subgroups. It may be interesting for a school to know differences between responses from boys and girls, from students seeking boarding status and those who would be day students. It may be even more important to look at results on the basis of final action taken by those who visit for an interview (see below). Asking the same questions of each visitor, immediately following the interview and before final decisions are made by either the school or family, makes it possible to identify differences in perception as well as flaws in the interview and/or the tour of the school.

In preparing a survey, some questions should be broad and cover interests in independent schools in general. Ask questions about the importance of different factors governing a family's interests in independent schools; ask where a family has learned about schools; ask what characteristics are "ideal." Ask for the list of schools the family is visiting in its search.

Some questions should be asked that will permit direct comparisons between what the family is seeking and what they see at your school. Do their perceptions of your school approach their "ideal"? In what areas do you appear to fall short?

Are the tour guides and the interviewers as sharp as you would like them to be? Don't be afraid to ask your visitors. In the surveys completed since 1983–84, candidates and parents frequently express appreciation for the opportunity to respond to their experiences during their visit.

Examples of how survey data can be subgrouped and used for comparative purposes are shown in the two charts following this text. Each chart provides information for three groups of candidates: those who enroll, those who declined acceptance and those who visited but did not apply.

Chart 1: Candidate Responses to Importance of 20 Factors, by Subgroup

This chart shows that "A caring and concerned faculty" has been ranked first by all candidates, among twenty factors that may be considered when selecting an independent school. "Teaching ability of the faculty" is ranked second, overall. The different lines represent subgroups and show how they each rated these factors on a ten-point scale of importance.

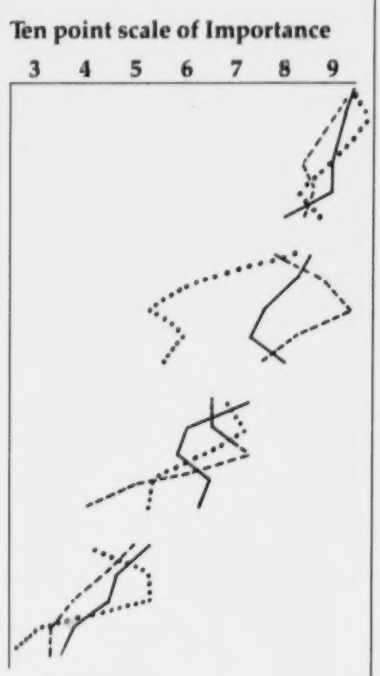
The "enrolled students" subgroup, ranked "caring and concerned" first, at 9.6, and "teaching ability" second at 9.4. They ranked "variety of extracurricular activities" and "kind/extent of social life offered" both at 9.0, tied for third place. "College placement record" rated 8.6, with "library facilities" at 8.2.

The subgroup, "accepted/declined students", ranked "teaching ability" first, at 9.8, "caring and concerned faculty" second, at 9.6, "extracurricular variety" third, at 9.2, followed by "availability of counseling services" (8.8) and extent of social life" (8.6).

The subgroup, "Interviewed but did not apply", ranked "caring and concerned faculty" at 9.5, "teaching ability" at 9.0, "extent of social life" at 8.8, "extracurricular activities" at 8.6, followed by "availability of counseling services" at 8.4.

Chart 1: Candidate Responses to Importance of Twenty Factors, by Sub-group

Enrolling students (_____)
Accepted/declined students (. . . . .)
Students who interviewed but did not apply (- - - - - -)


Ten point scale of Importance
3 4 5 6 7 8 9
FACTORS (In order of Importance)
A caring and concerned faculty
Teaching ability of the faculty
Variety of extracurricular activities
Kind/extent of social life offered
Availability of counseling services
College placement record
Library facilities
Structure of discipline
Student/teacher classroom ratio
Athletic program and facilities
Reputation of the school
Arts programs and facilities
Competitive academic program
Dormitory accommodations
The head of the school
Attractiveness of campus/buildings
Drug and alcohol education program
Total number of students enrolled
Socio-economic diversity of students
International exchange opportunities

Major differences appear for the factors "structure of discipline" and "the head of the school." Other differences are shown for "library facilities," "student/teacher ratio," "athletic program and facilities," "arts programs and facilities," and "competitive academic programs." Clearly, the discipline structure appears as a negative factor to candidates who interviewed but did not apply. This subgroup appears to be looking for a competitive academic program and may not have felt positive about the program they perceived at this school.

The structure of discipline at the school was clearly not as important to the subgroup of candidates who declined an offer of admission. Neither was student/teacher ratio nor the athletic programs and facilities. Arts programs appear to be more important to this subgroup.

It is now up to the school to separate perception from fact and to work toward changing perceptions of the school if it wants to be more attractive to those who did not apply, those who declined admission, or to both subgroups.

An alternate position a school might take is to strengthen its presentation of those facts that are basic to its philosophy and work to change part of its annual candidate pool. One must also study responses by sex and perhaps by age or grade level before making changes.

Chart 2: Candidate Responses to Words and Phrases Describing School A

Enrolled students
Accepted/declined students
Students who interviewed but did not apply
Black vertical lines (|)—Percent describing word/phrase as "Ideal"

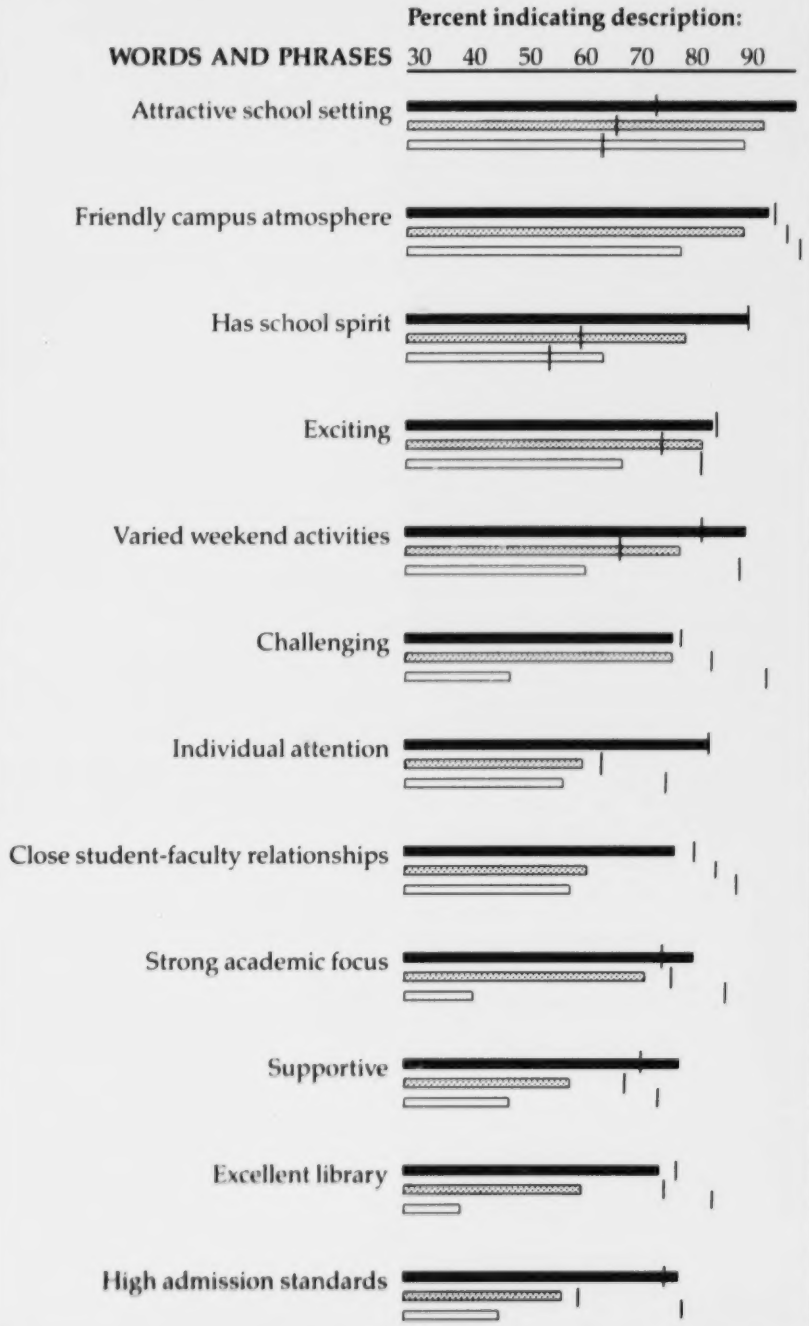
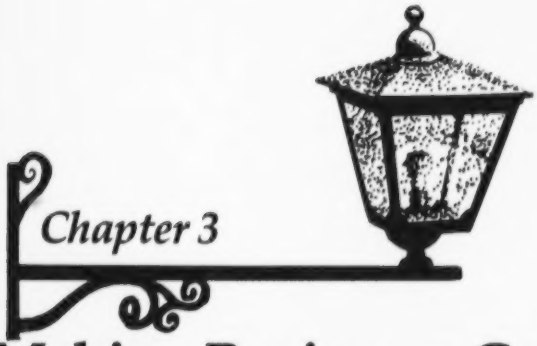


Chart 2: Candidate Responses to Words and Phrases Describing School A

Candidates are asked to check those words and phrases that are characteristics of their "ideal" school. They are then asked to repeat the list and check those characteristics they feel describe their perceptions of the school. This chart lists the words and phrases in the order checked by all respondents as a description of the school they have just visited. "Attractive school setting" was checked by 94% of all respondents as descriptive of this school. "Friendly campus atmosphere" was checked by 89% and "Has school spirit" by 83%.

Here too, differences exist between the same three subgroups. Furthermore, one must look at differences that appear between the percent who check the characteristic as a description of the school and the percent who checked it as "ideal"). First, one notices that top descriptors are not those associated with academics, but rather those having more to do with scenery and atmosphere. In fact, looking down the list one notes gaps for "challenging"—93 percent of those who interviewed but did not apply list this as an "ideal," yet only 46 percent checked this as a perception of this school. No subgroup has checked "close student-faculty relationships" as a description of the school as frequently as it has been checked as an "ideal." The same is true for "excellent library."

These charts highlight response patterns and are used here as examples. When dealing with a set of perceptions gathered in a formal process with a large enough number of respondents to provide statistical significance, it then becomes possible to take steps based not on guesstimates but fact.■



Chapter 3

Image Making Begins on Campus

Clayton G. Chambliss

In recent years, competition among independent schools and with the public sector has increased dramatically. At the same time elitism has become a bad word. These changes can be viewed as positive, if one considers it healthy that education has been forced into the marketplace—forced into the Darwinian posture of competition where only the fit will survive; forced to take a hard look at the contribution being made to the future and to a better world. Schools must put their reputations on the line to justify why they exist, and prove that they do contribute and are able to produce measurable results. The following case study outlines steps taken by one school to deal with answers to the questions posed by a new era for independent schools. The school tried lots of different things, and logged in both successes and failures. While some of its efforts have produced results and the school has been able to maintain its fair share of the market, the specifics are meant to provide information and inspiration—each school will have to find its own unique blend of programs and processes to build positive images and communicate well with important constituencies.

First, a bit about the school and its place in the market. The Bolles School was visited recently by the director of admissions from the University of Alabama, who made the comment that he felt that many admission officers consider themselves guards of the gate. In the same vein, at the 1986 NAIS Workshop in Rennselaerville, John Ratté mentioned that he felt many admission officers in the country are misnamed—that they really be called "directors of rejection" rather than "directors of admission."

Unfortunately, or perhaps fortunately, admission officers in Jacksonville can never consider themselves guards of the gate or directors of rejection.

The independent school community in Jacksonville is a very competitive one in many respects. There are four very good independent secondary schools in the city—all are fiscally sound, do a good job and have opened with full enrollment in the last three or four years. At the same time none of the schools is in the position of turning away qualified candidates. The independent schools also are faced with an ever improving public school system and a superintendent of schools who is intent on promoting the public system to the detriment of the independent sector. The job of the admission officer at Bolles is to present the school as candidly as possible and to help prospective families clarify their expectations, so that together they can see whether or not there is a good match. In addition to this evaluative task, the director of admission plays an important role in a schoolwide marketing effort that draws people to the campus in order to create "potential matches."

The concept that education is a saleable service or product may seem heretical. Many school people recoil at the suggestion that schools should promote themselves in the truest sense of capitalism. However, independent schools reject the concepts of business at their own peril. It is absolutely essential that independent schools develop a marketing strategy and adopt many of the policies and procedures of successful business. In an atmos-

phere of egalitarianism and concern for society at large, independent education must become known as a responsible and contributing citizenry committed not only to its self-preservation but to the creation of a stronger society.

There is nothing wrong with a high level of visibility created by aggressive marketing designed not only to increase awareness of the existence and mission of independent schools but also to enroll qualified students. This can be done without losing any of the mystique or stature associated with being an educator in the purest sense.

In this light, several years ago, Bolles's administrators decided to make a conscious and concerted effort to move into the mainstream of community life in Jacksonville. They decided that the school must become a highly visible institution and move into leadership roles in various community activities. They decided that if the school were to continue to grow into the '80s and '90s it must change its posture. The school had to become a contributing, highly visible, corporate citizen.

In searching for a vehicle to begin this program the school came upon the Special Olympics, just beginning nationally and locally without a sponsor. For very little money and lots of labor, Bolles adopted the Olympics, even assuming responsibility for attracting other sponsorships from the City's business community. Response was immediate. Publicity visits to the campus by people who otherwise would not have a reason to be there (and good will) were the immediate and most visible results. The school's motives were not initially "altruistic"; however, the reach-out created an extraordinary opportunity for students, faculty and staff to work with the handicapped youth, providing a positive dimension to their own educational experiences and adding to the success of the effort. This effort has snowballed. Since then the school has been called upon dozens of times to host charitable and educational programs, and

Bolles is glad to oblige, continuing the effort which began as a planned program more than a dozen years ago.

It is important to reemphasize the school's long-range motives in these efforts along with their degree of success. The underlying philosophy is best described as a commitment to policies and procedures which serve to posture the school in its community as a major corporate citizen whose role is to enhance the quality of life and to support Jacksonville in its efforts to grow and improve. This lofty-sounding mission has guided Bolles well. When taking a long, hard look in the mirror, as the school did several years ago to determine strengths, weaknesses and how to achieve important goals, the staff found there were five areas that needed desperately to be worked on:

1. ***On-campus image***
2. ***the image of faculty and administrators off-campus***
3. ***publicity***
4. ***approach and procedures in the admission office***
5. ***joint efforts with other schools locally and in the region.***

Other trouble spots might be identified in one's marketing program. In Bolles's case, however, these five areas were deemed to be the most problematic and also areas that could show improvement with reasonably modest allocation of resources. In identifying these areas of concern, the school had to let go of some "sacred cows," and admit how poorly or inefficiently some things were being done. The school had to "buy into"—build an awareness of and commitment to—corporate citizenry as an important part of school life.

On-Campus Image

Administrators became aware that a majority of people knew Bolles first through the switchboard operator. Up until then, the person answering the telephone at Bolles gave callers the impression they might be interrupting a coffee break. What resulted was a campaign to educate and help the nonacademic staff understand the meaning of public relations and how important their manner was when meeting the public in person or on the telephone. They were instructed to offer help even if the caller had reached the wrong department.

Bolles found that it was helpful to provide uniforms for the maintenance staff and grounds crew. They accepted these uniforms very readily, not only because it saved on their laundry bills but also because they enjoyed presenting a more professional image. Likewise, the security staff was instructed as to their role as public relations officers (once it was realized that shooing people off campus promoted a climate of exclusivity and elitism). Guards were told that many people who visit the school are alumni, tourists, prospective donors, prospective students. Particularly because of Bolles's Florida location, many people were driving through the campus on Sunday afternoon just to look over the school as prospective parents.

To assist the security staff and grounds crew to be more helpful to outsiders, Bolles produced a small, inexpensive pamphlet containing general information about the school, its facilities and a return card to send for more information. The security people enjoy handing these out and have learned more about the school from the pamphlet. Periodic meetings with support staff introduce new publications, review the slide show and provide an update on recent accomplishments by members of the school community. These meetings are relaxed and social in nature, providing an opportunity for administrators to make staff feel very much a part of the community and to express thanks to them for their contributions. A sense of pride, accomplishment and caring can be established with the nonacademic staff if they are drawn into the community more closely and made to feel that their work and their attitude make a difference.

Opening Up the Campus

The school then set about finding ways to open up the campus to the public, starting with the Special Olympics, which was only a beginning. Bolles also hosted youth soccer and Pop Warner football and became a voting precinct. A biddy basketball group plays basketball in one of the gyms every Saturday morning. Bolles offers its facilities to charitable and educational groups free of charge, building into the budget the necessary clean-up and security expenses. The school feels the benefits far outweigh the expenses and any inconvenience in opening the school for outside use. Many sixth grade boys say they want to come to Bolles because they have played basketball in our gym or have attended Bolles day camp. They already know the school and like it.

Bolles also *rents* facilities to the Symphony Orchestra (for practice), theater groups, dance companies, and also to businesses and individuals who use the grounds nearly

every Saturday and Sunday afternoon for weddings and other functions. A special sign at the entrance welcomes the visiting group by name, and visitors receive a brochure about the school. Time and again people mention that they had no idea what was behind the entrance on San Jose Boulevard until coming to Bolles for a company picnic. They like to wander around and look at the computer labs and fine arts facilities. They see that the classrooms have a limited number of desks to accommodate small classes.

The day camp program is beneficial to the school in many different ways. Not only does it allow 200 children to have a good time on campus for four two-week sessions each summer, but it also provides summer jobs for many members of the faculty and older students. The camp generates an annual income of $45,000. In addition to day camp, there are swim camps, cheerleader camps, wrestling camps, a baton-twirling camp—and the list goes on. Bolles views all these activities as a natural extension of the school mission—worthwhile both for programmatic value and for the "business advantages" they afford the institution.

Bolles moved beyond the argument that schools need to be closed in the summer for maintenance and repair. How many apartment complexes shut down entire buildings in order to repaint or to fix plumbing? How many office buildings do the same? It simply does not happen. Preventive maintenance and upkeep at Bolles have become an ongoing year-round program students and faculty have learned to accept and live with. Further, the summer can be used productively to exercise the special talents of the faculty—the computer staff can run computer camps, artists and musicians can give lessons, augmenting both their own and the school's income. The more people who see the campus and who understand the school to be a place where they have had a positive experience, the healthier and more well received the school will be.

Bolles also turned its attention to the faculty and administrators' image within the community. Bolles believes these individuals represent the school in everything they do, whether on a family picnic, at church or just walking down the street—they are The Bolles School. In the hiring process, prospective employees must agree to the spirit of this commitment if they wish to work at Bolles.

Further, the Board of Trustees committed to support *all* administrators, not only the headmaster, in their work and participation in civic affairs. The head and director of admissions joined the Chamber of Commerce and the Committee of 100, working particularly hard with

the latter, attending meetings and visiting new companies in town. The school is represented in three Rotary Clubs, Meninak, United Way, Pop Warner, most youth sports and the Tournament of Players Championship, a charity professional golf tournament which is held in Jacksonville.

By associating and working with other civic leaders in the community, Bolles lends credence to the school mission to be a part of the corporate community and to help improve the quality of life in Jacksonville. Also, school administrators have, on a one-to-one basis, gotten to know, on a first name basis, business and civic leaders in the community. When they have questions about education or are considering educational alternatives for their children, they turn to Bolles as part of the "good old boy" network. Seen as educational experts, Bolles people are asked often to serve on panels, to be in charge of programs for noon-day civic clubs and to address young leadership programs. Visibility is the key. The school feels it is spending wisely to support this kind of interaction; the added expenses for country club memberships, civic club dues and an occasional lunch off campus are an investment in good community relations.

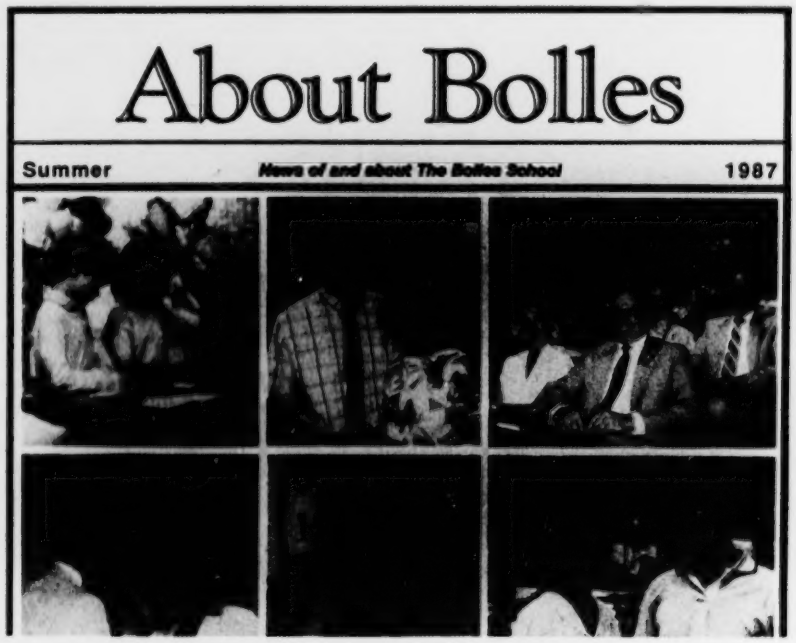
Bolles in Print

The school's third area of concern was its printed publicity and advertising, which demonstrated a reactive ambiguous posture rather than an assertive, well-planned stance. In an effort to increase name recognition, the school introduced a new logo in conjunction with the celebration of Bolles's 50th anniversary. This was used in all display advertisements. Following the 50th, the school developed a "permanent" logo with longlasting appeal which is now carried on all school printed matter and advertisements.

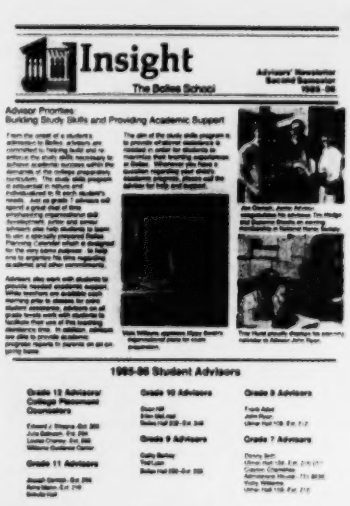
In the past, Bolles had advertised occasionally in the Jacksonville newspapers and responded to solicitations to other advertising opportunities on whim. This made planning a budget almost impossible. Further, the ads did not carry consistent themes and at times their execution was amateurish. The school realized the importance of defining the constituency it wanted to reach and the image it wanted to create with print advertising. Bolles came to the conclusion that newspaper advertising was both nonproductive and very expensive. (Other urban schools have had greater success with this medium; see Chapter 6.)

Advertising dollars were retargeted to local publications of interest to Bolles's constituency. The total dollar amount spent decreased with placement in a wider range of publications, such as the Chamber of Commerce magazine and relocation guide, the Junior League monthly magazine, the Symphony Orchestra and local theater company programs and the program for the Tournament of Players' Championship.

These publications generally are


About Bolles

Summer — News of and about The Bolles School — 1987


Insight

The Bolles School

1988-89 Student Advisors

The President's Letter

Newsletter of The Bolles School

Spaces Are Available For '88-89

School To School

We Care And Share

BEST COPY AVAILABLE

read by people who might be in a position to send their children to independent schools. At the same time, certain other publications have been targeted in hopes of attracting minority students.

Frustrated over an inability to get good news published in the local papers and failing miserably at efforts to send press releases locally and to hometown newspapers, the school decided to publish its own paper *About Bolles* nine times a year. The format is simple, a 4-page tabloid, printed on slick paper, full of pictures, announcements, calendars—all sorts of informative items about Bolles—for the school community. This publication gives the headmaster a chance to editorialize and promote upcoming events, thereby eliminating mailings by individual departments. Class notes update alumni on news of their classmates. The paper is sent bulk mail to reduce the cost of mailing to the school's extensive list. (Persons inquiring about any of Bolles's programs automatically are placed on the mailing list until such time as they ask to be taken off or their child is past high school age.)

Streamlining the Admissions Process

Bolles gave special attention to personalizing and streamlining the admissions process itself. Believing that the admissions office is the front door to the school and that the impressions made there are lasting ones, the school remodeled a house at the entrance of the campus to be an admissions house and reception center. This project was underwritten by a capital campaign corporate gift. Of course, buildings are not the only answer. Bolles works toward establishing personal relationships with as many of the prospective families as possible. Therefore the name of the director of admissions is used in most school publications to promote the idea that a specific person is working with the family, not just an admissions "office."

Up until two years ago, the school's automation was limited to an APPLE II, connected to a

The Bolles Admissions House

memory typewriter for word processing. Even with this modest set-up, Bolles was able to personalize most correspondence, customizing acknowledgment letters for current families, siblings and so forth. Now more sophisticated computer/word processing equipment enables Bolles to communicate with families in a carefully planned sequence to make them comfortable with each step of the admissions process.

Because Bolles is in a very competitive location, the school needs to do some selling after the child has been admitted. Bolles produced a T-shirt which is given to every admitted applicant. These shirts have been very popular with the recipients; the children wear them to their feeder schools and are quite proud for everyone to know that, in order to have one, they had to be admitted to Bolles.

The school continues this process of personal attention with the new class by running very thorough orientation programs for students. Current students wear special hats during the first few days of school so that they stand out as people who can answer questions or give directions. Registration days are staggered to avoid long lines in the bookstore and to enable the bookstore manager to establish a personal contact with the new child and family.

All of these procedures are not new or innovative, but are based on knowledge that applying for admission can be an intimidating, confusing experience for a youngster and his or her family. Changing schools, particularly for a 7th grader, can also be a traumatic experience. The school feels an obligation—particularly to families with no prior independent school experience—to make candidating and the first days of school as pleasant, informative and smooth a transition as possible.

Saying No Nicely

A word about denials—Bolles believes that the way denials are handled by a school can be a very important part of its public relations program. It would be inconsistent to tell the public on one hand that independent schools are institutions priding themselves in dealing with the individual—encouraging families to visit, take tours, have coffee during morning testing—and then on the other hand to write a vague innocuous letter blaming the decision on a committee. A family first should be made aware of a negative decision by letter, giving them an opportunity to react in

private. The family should be invited to discuss the decision with the admissions officer. These conferences are not easy; however, in most instances, they end up on a positive note.

In many instances the admissions officer is the first educator who has ever taken time to explain test scores and subjective data and how a match is determined. If a family can understand that the school is making its decision based on the child's best interest as well as an institutional interest, they may be able to respond to the denial positively. During these conferences, what is right for the particular child is discussed, and if appropriate, whether a match with a sibling might be possible. Feedback has demonstrated that even though a family has been denied admission, they feel they were treated fairly at Bolles and that they were provided with a service. While not attempting to bill themselves as educational counselors, Bolles admissions officers are willing to share their expertise and to refer families to counselors and other professionals in the case of more serious problems. This good will makes a positive impression in the community.

From Competition to Cooperation

Jacksonville's four independent secondary schools realized about 18 months ago that, although they were competitive with one another and were seeing many of the same families, they could best serve each other and themselves by trying to work together to increase the applicant pool. Initially it was the admissions officers at each of the schools who were the catalysts for a collaborative program. Other administrators were skeptical about being quite so open. Now the directors have lunch together once a month to discuss common problems and ways in which they can work together to present independent education to the public as a viable alternative.

Pressing in locally is an aggressive superintendent of schools—a public relations genius—trying to make the public system look better. He has taken the stance that any family enrolling a child in an independent school is disloyal to the city and not interested in the economic growth of the community. People like this superintendent are making an impact, according to some interesting and alarming statistics published by Gallup regarding the public perception of public education. When asked to grade public education, 52% of all parents of public school children graded their children's schools with an A or B. Even more alarming was the fact that 48% of those with an income of more than $40,000 graded the public school with A or B. The four schools have tried to present a united effort to make the public in Jacksonville realize that they are fortunate to have a quality network of independent schools as an alternative.

One of the marketing tools produced by the Jacksonville consortium is a very simple, inexpensive brochure that describes each of the schools. These are produced in large quantities and are distributed to the Chamber for newcomers' packets, realtors' relocation offices, libraries and display racks in selected tourist attractions. The group has done some joint advertising in the newspapers, as well as in the realtors' relocation guide and the Chamber newcomers' guide. Last year they put a joint ad in Piedmont Airlines in-flight magazine issue featuring Jacksonville. Before placing this ad, they got agreement that the independent school network would be mentioned in the copy concerning educational opportunities, thereby establishing a relationship with the editor who eventually used a full-page color photo of one of the schools to illustrate the article.

These joint efforts do not result in a hostile and adversarial relationship among private institutions or with public education. Rather they have provided a healthy spirit of competition in which the positives are emphasized. The results of this level of competition will lead to even greater commitments to quality for all participants and establish stronger institutions held accountable by the forces of the marketplace.

Growing through Marketing

In virtually every analysis of why people choose an independent school, a major consideration is the school's commitment to a systematic procedure for communication

with students and their families. This is one area in which clearly the independent sector is outperforming its public sector colleagues. This concept is reiterated in the popular book *A Passion for Excellence*, a follow-up to *In Search of Excellence*, aimed at industry, but easily adaptable to the nonprofit world. In it, the authors stress the need to be in touch with what the customer wants. Their buzz words are "management by walking around" and "naive listening." It all boils down to courteous attentiveness.

In some respects, this commitment is a combination of both selling and educating. It is essential that independent schools regard the retention of students as important as the initial enrollment. When families become disenchanted because the independent school has somehow not fulfilled their expectations, they begin to look elsewhere and, as a result, what may have been a continued enrollment for four, six or more years becomes fewer. Meaningful communication with families is not merely a public relations gimmick, and to ignore the importance of the parental attitude toward the school and its services is to ignore reality.

Controlling Attrition: A Part of Marketing

Bolles in recent years has become more concerned about attrition, which had risen from 7% schoolwide to 12%; one class reached 20%. After countless and meaningless hours of debate as to "whose fault was it," the school decided to ask those who left "why?" Bolles produced an exit survey and mailed a copy to each set of parents who chose not to re-enroll their child, asking them to fill it out honestly and candidly and return it anonymously to the head. The questions asked were direct and to the point. Room was left for comment.

The return was 70%, and upon analysis, Bolles discovered recurrent themes. In some instances the school learned there were components missing in the way the school communicates with current families; they did not necessarily feel in close touch. Acting on what they learned from this simple research, the school decided to publish *Insight*, in addition to *About Bolles*. A semiannual newsletter, *Insight* is produced by the guidance department and is intended to share with families the calendar of programs and events of an academic and counseling nature, and also the goals and purposes of these programs.

Material is provided on every grade level. Bolles chose to use this format rather than a letter specifically addressed to parents in each grade because parents often are as interested in activities their children will be exposed to in subsequent years as in current activities. Giving both an overview and a lot of detail, this publication is an effective educational tool, intended to reinforce a commitment to Bolles families. As such, it can be viewed as a marketing technique as well as an educational service.

A regular letter from the head of school can be an important tool of communication, but regrettably many heads tend to be wordy, pedantic and sometimes dull. Bolles uses headmaster communications on special rather than regular occasions, making the importance of a communication from the head's office more obvious and less of a frequent drain on his time.

The narrative comments of teachers and communication with parents through counselors or advisers are as varied as are independent schools. It is safe to say, however, that most of the schools recognize the importance parents attach to meaningful communication from the school. Families expect more than grades, checklists and clichés such as "Johnny is not working up to his potential." Faculties must be sold on the importance of creative and meaningful communication, and every school must recognize that this is, in fact, one of the services purchased by independent school customers.

Conclusion

By now it must be clear that independent schools must market their services and then perform the services they have marketed—that is, *deliver* education. It is not that these schools are to be salesmen first and educators second. The real message is that if they do not adapt to some of the proven techniques of marketing, they run the real risk of having too few for whom they can perform their primary role—that of educators.

The marketplace is the real world, and independent education will ignore its pressures, challenges and demands at its own peril. Aggressive marketing, creativity and finally accountability are the standards by which schools must measure their performance. If they have marketed their services with these challenges in mind, they can deliver a positive, meaningful educational service second to none.■

Chapter 4

Collaborative School Marketing

Mary Lathrop Will

No school is an island complete unto itself. Each depends on a broader community, current and potential students, their families and members of the educational world for their good opinion, support and evaluation. Recognizing this, the weighty task of running a good school and making those outside the school's bounds aware of just how good it is, has prompted many administrators to pool resources, seek the strength of numbers and, with a host of professional colleagues, make the case for independent education collaboratively and noncompetitively.

The public is largely unaware of or unable to articulate the benefits offered by the tuition-charging schools which serve as alternatives to the tax-supported public schools. Yet parents must have a general understanding of the educational alternatives available both publicly and privately in order to make informed decisions about their children's schooling. Recognizing this social need and eager to increase the size and socio-economic diversity of their applicant pools, school administrators from around the country are entering partnerships to increase public awareness of their schools. Colleagues at neighboring schools, schools of the same type or schools representing a spectrum of traditional and nontraditional educational programs have decided that the time has come to meet and discuss the many ways in which they, together, may expand the public consciousness and appreciation for what each is offering.

In the paragraphs that follow, examples of collaborative marketing efforts illustrate how particular groups have initiated new communications programs to reach new audiences. Consideration also is given to understanding the limitations of collaborative marketing.

In Strength, Numbers

Collaborative marketing is, in many respects, an idea born out of the conversations of administrators who have gathered annually at regional and national meetings to exchange ideas and resources with their colleagues. Today, groups are forming into active marketing agents of schools in partnership with their own. Some are exploring direct mail of collaborative recruitment literature, joint travel, open houses, collaborative minority recruiting and collective advertising. Others are sponsoring market research or setting up staffed recruitment organizations.

Skeptics cite concerns about loss of independence, lack of time and collective energy or fear revealing too much about their school's successes and failures. Others favor the all for one, one for all spirit in principle, but find its implementation costly and inefficient. However, the successes even of early ventures suggest that the benefits of joint projects far outweigh the imagined (and actual) disadvantages.

"United We Stand, Divided We . . ."

A consultant hired to research how one particular group of schools might strengthen and expand its collaborative admissions efforts studied five collaborative organizations in other cities. In his report he noted that 1) "concerns about competition between schools had been replaced by an attitude of collective cooperation," 2) the organizations had realized great value in having one organization speak to the media on behalf of independent schools, 3) "similarly, there is considerable value to the public if there is one principal resource for information about independent schools," 4) "Administrators, teachers and trustees often operate in isolation unless there is an external mechanism that reinforces the value of professional growth and development through regular

communications with other schools and the discussion of the common issues," 5) "Certain economic issues, if addressed on a collective basis, can result in considerable savings for each school."[1]

Acting collectively, schools can extend their resources, in some cases dramatically. Using the best of each school's internal networks (parents, students, alumni, friends and media contacts) and the various equipment, talents, experience and interests present in each admissions, development or advancement office, projects once thought impossible to coordinate and implement become realities.

The Maine Case

A group of nine Maine boarding schools banded together to inform families in Southern New England—Massachusetts, Rhode Island, Connecticut—that "the vacation state" also provides a serious secondary education. In a bold move the schools took a booth at the Eastern States Exposition, a large country fair held annually near Springfield, MA. The schools designed a booth that both satisfied the rigorous standards of the fair committee and represented their schools in a dignified manner. Key objectives were to offer families substantive information about the wealth and variety of educational opportunities in Maine and to dispel myths that Maine, despite being a sportsman's paradise, is inaccessible, cold and culturally deprived.

Three teams of two admissions representatives (not from the same school) covered the booth for three days each. Families were offered a brochure introducing Maine as a wholesome and sensible place to consider educating a child. The text speaks to the varied challenging opportunities Maine boarding schools and colleges offer students and briefly describes each of the nine participating schools. Reprints from Peterson's guides were also distributed, but schools gave out catalogs sparingly, preferring to promote Maine boarding schools first, not their individual schools.

No individual school could have borne the time away from campus and the expense of running this booth. However the group, acting collaboratively, made a success of it and plan to return for a second year. The first year's objective—to generate inquiries—will shift next year to convincing families to visit and apply.

Making the News in the Twin Cities

Schools, whose presence in the community may have elicited only occasional attention or moderate response from the public sector may find themselves in an entirely new position as the result of undertaking a collaborative marketing program. For example, if a school wishes to use the media to disseminate its message, it will find producers or writers often reluctant to promote one "private" school. However, those same producers and writers may be more willing to feature the efforts of several schools acting collectively to inform families about educational alternatives. Realizing that the public will be less wary of an "advertising bias" when offered information about the several options available for their children, the producers can justify what they present as "news". A story with universal appeal—"Good citizens from independent schools offer families with teenagers free information and counseling about school choices"—will make it on TV. The media wants it aired, the viewers want to hear the message.

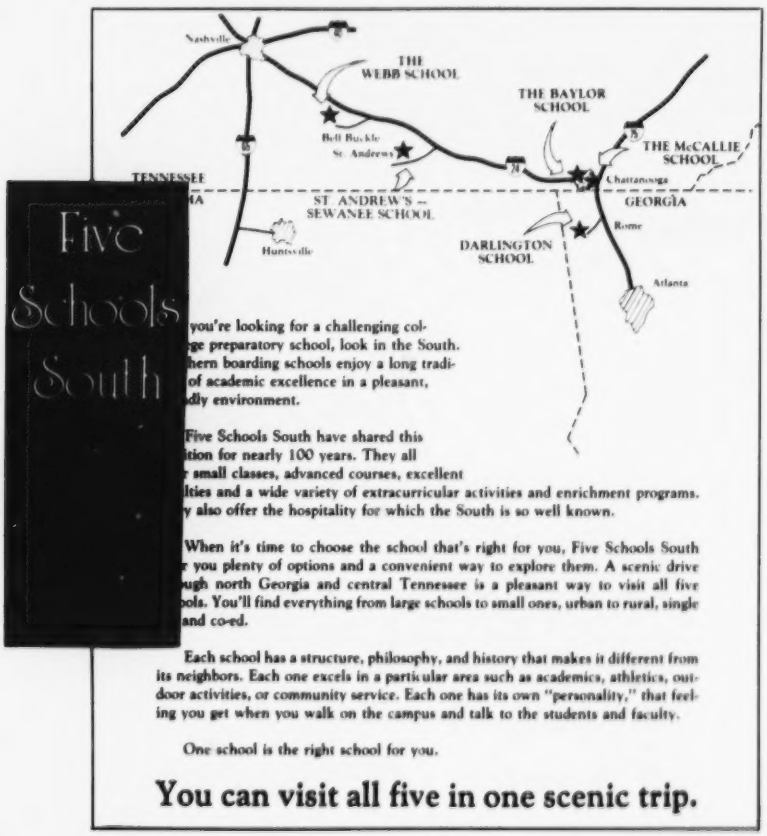
In Minneapolis-St. Paul, the Twin Cities Admissions Association, a group of twenty-nine schools, kicked off the 1986–'87 recruiting cycle with Expo '86, a school fair that drew the interest of news reporters from the ABC, CBS and NBC affiliates in the Twin Cities, as well as two local talk shows. The media was intrigued with the schools' "fresh" approach in informing the community of their educational options. One reporter's glib description of the "event" as "one-stop educational shopping," provided the perfect opportunity to explain the complexity and personalization of the admission process.

The Twin Cities Admissions Association met informally for the first time twenty months before Expo '86. At that time, many of the school representatives were meeting one another for the first time; even this relatively small group of school administrators were strangers among themselves. They reasoned that if the members of the independent school community were uninformed about the options and programs each presented, the public would surely be uninformed.

In the beginning of the group's association, monthly meetings were scheduled focusing on professional development. Later each school contributed $100 for the purpose of creating a directory which would include pertinent information about each of their schools. Initial distribution plans included realtors, the Chamber of Commerce, corporate human resource officers, dentists, pediatricians, colleges, churches, youth and community groups.

The group then began to consider a forum for reaching individual families. They chose a fair as their means—Expo '86. Essential to the fair's success were planning, delineation of tasks, and publicity. Two less tangible factors also played an important role. This new association had emotional energy behind it—the group had formed and bonded quickly. Members felt extremely proud of the multiple opportunities for education in the Twin Cities and wanted to share their own recent discoveries. Meanwhile a positive, supportive attitude towards education prevails in the Twin Cities. Corporations, government and various interest groups consider education the #1 priority.

To further promote the spirit of cooperation between the schools and community and to downplay the sense of competition that parents sometimes anticipate at fairs, the Association offered for distribution a common brochure that included all metro-area day schools (independent and parochial) and an Expo '86 sponsors' fact sheet (including the three Minnesota boarding schools). At the end of the fair, families could request that specific schools send information to them. Building upon the first success, the group continues to hold educational fairs for the community and finds that recognition for and interest in their schools is positively affected by these efforts. In addition to the media coverage at the time of Expo '86, two magazines recently have profiled independent education.


Five Schools South
THE WEBB SCHOOL
THE BAYLOR SCHOOL
THE McCALLIE SCHOOL
Bell Buckle
St. Andrews
Chattanooga
TENNESSEE
GEORGIA
ST. ANDREW'S – SEWANEE SCHOOL
Huntsville
Rome
DARLINGTON SCHOOL
Atlanta
you're looking for a challenging col-
ge preparatory school, look in the South.
hern boarding schools enjoy a long tradi-
of academic excellence in a pleasant,
dly environment.
Five Schools South have shared this
tion for nearly 100 years. They all
small classes, advanced courses, excellent
lties and a wide variety of extracurricular activities and enrichment programs.
y also offer the hospitality for which the South is so well known.
When it's time to choose the school that's right for you, Five Schools South
you plenty of options and a convenient way to explore them. A scenic drive
ugh north Georgia and central Tennessee is a pleasant way to visit all five
ols. You'll find everything from large schools to small ones, urban to rural, single
and co-ed.
Each school has a structure, philosophy, and history that makes it different from its neighbors. Each one excels in a particular area such as academics, athletics, outdoor activities, or community service. Each one has its own "personality," that feeling you get when you walk on the campus and talk to the students and faculty.
One school is the right school for you.
You can visit all five in one scenic trip.

Who's Doing What with Whom (and to What End?)

A recent NAIS telephone survey identified over thirty regional associations of admission officers, from Maine to Hawaii, presently involved in some form of collaborative marketing. Several associations are publishing member school directories; others have published or are in the process of designing marketing pamphlets. Joint travel and recruitment are attempted by both formal and informal groups. At least one association of schools has invited and encouraged educational counselors to visit its schools by offering them an all-expenses-paid trip. Some associations have tried joint advertising to draw public awareness to upcoming admissions dates and available scholarships or to announce scheduled open houses or school fairs.

Others have done joint admissions testing, issue standardized teacher recommendation forms with their applications (Philadelphia Area Schools; Association of Independent Maryland Schools; Jacksonville, Florida Independent Secondary Schools) and have common notification dates for admission decisions. Examples of school collaboratives working to apprise families of the variety of educational options and to streamline the admissions process are neither few nor far between. Some groups experience immediate individual successes, enrolling students who might otherwise never have considered their schools. Others find the cause and effect less tangible at the individual school level but wisely are able to wait for the trickle-down phenomenon to reach them through sustained efforts. Others still wonder if the group can keep up the energy, time and leadership needed for short- or long-term results.

One might ask what characteristics the successful collaboratives have in common—what is the glue that holds a group of schools together beyond the ties of a formal state association structure. What

might one learn from the achievements of two kinds of collaboratives, the so-called *Alphabet Soup Groups* and the *Girl Groups?*

Alphabet Soup Groups

Geography is the common denominator for the Hartford Area Boarding Schools (HABS) coalition which links six schools located within 30–40 minutes of Hartford, Connecticut's Bradley International Airport in a joint recruiting and advertising venture. This group of admission officers at Avon Old Farms, Ethel Walker, Loomis Chaffee, Miss Porter's, Suffield and Westminster pools monies every year for recruitment trips, direct mail and events-directed promotions of their schools. HABS originally was the brainchild of one of the school heads who wanted to see his admission staff get more national visibility without spending numerous dollars and multiple weeks on the road. He persuaded the other school heads to commit seed money to launch a joint recruitment program and the directors of admission were asked to establish a travel program which would introduce the schools from around Hartford to the "new markets."

In the first year, pairs of HABS representatives made three week-long trips during which they maintained a tough schedule of visiting counselors and schools by day and hosting receptions for prospective families by night. With six schools involved and assigning two schools to each trip, it was possible for the admission officers to give up only one week's travel time to the commonweal. There were additional "other" duties—research and network building in the communities targeted for visits, educating each school's admission officer to represent all the schools and preparing materials to give equal time to all the schools (one director of admission prepared a combined schools sound-slide show).

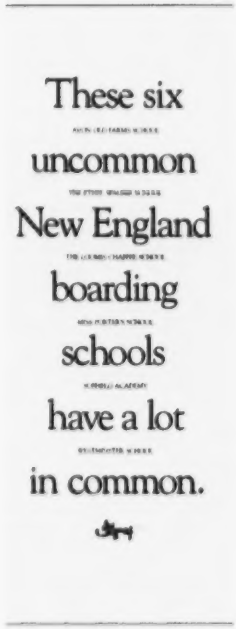
They agreed to portray their own and other schools using noncompetitive descriptors. There are no comparisons of the number of volumes in a school library or the prowess of sports teams. Schools describe themselves on the basis of student body size, numbers of day students and numbers of boarders. Each officer has become the designated representative of a school(s) other than his or her own. Patterns have emerged in the trip scheduling that serve to put representatives of schools least like one another in the same traveling group, fostering the image that six schools in close proximity are able to represent a broad spectrum of educational options.

Over the course of their three recruiting cycles, members of the group (HABS) have assessed the ties that bind them together so successfully. The building block for their association was proximity to the same airport.

Over the course of their three recruiting cycles, members of the group have assessed the ties that bind them together so successfully. The building block for their association was proximity to the same airport. Another real strength is that the six schools can offer something for many different kinds of students. No one school is seen as preeminent; there has not been a tradition of fierce competition or overlap in the kinds of students the schools ideally seek to serve. HABS members view as the greatest strength of the endeavor, the common bond of their new professional friendships and mutual concern.

It is important to note that not all of the trips have been unqualified successes. In the first year, they did not feel they made inroads in the "new markets." They have since learned what makes a trip good for them, where they should go, whom they should see and how best to get their message across. They had to set standards, for instance, for receptions held at the home of a "friend of the school." Currently, one school takes responsibility for finding the host in a particular city. The other schools identify secondary hosts whose role is to promote attendance and distribute school catalogs. No matter how good a "friend," that primary host must meet certain basic criteria and is given clear instructions on how to organize and advertise the party. A host, according to one director of admission, should have 13–15-year-old children, should know a cross section of the community's opinion leaders, be known as a pleasant and cordial host and be sensitive to the nuances of the gathering's location. (The choice of location can in some cases restrict which families will attend, which could be counterproductive to the event.)

Resulting inquiries from group travel have been difficult to measure. Applications and enrollments have been easier to quantify but have varied from school to school. Through one public school visit, the group enrolled four minority students. Two of those four attended the same HABS school. This success is qualified by the knowledge that other well-known schools had cultivated the school district paving the way for HABS to benefit from some tag-along success not entirely of their own making. In the second year of joint travel, ten applications could



be identified as resulting from one of the group's efforts. One school estimates its current recruiting expenses to be about $800/enrollment, making the +/−$4,000 spent per school on joint travel seem costly. But neither heads of the HABS schools nor their directors of admission seem deterred by the straight costs. They are encouraged that their schools have received exceptional exposure through joint travel and have further boosted visibility with a promotional flyer produced last year to introduce "Six Uncommon New England Boarding Schools."

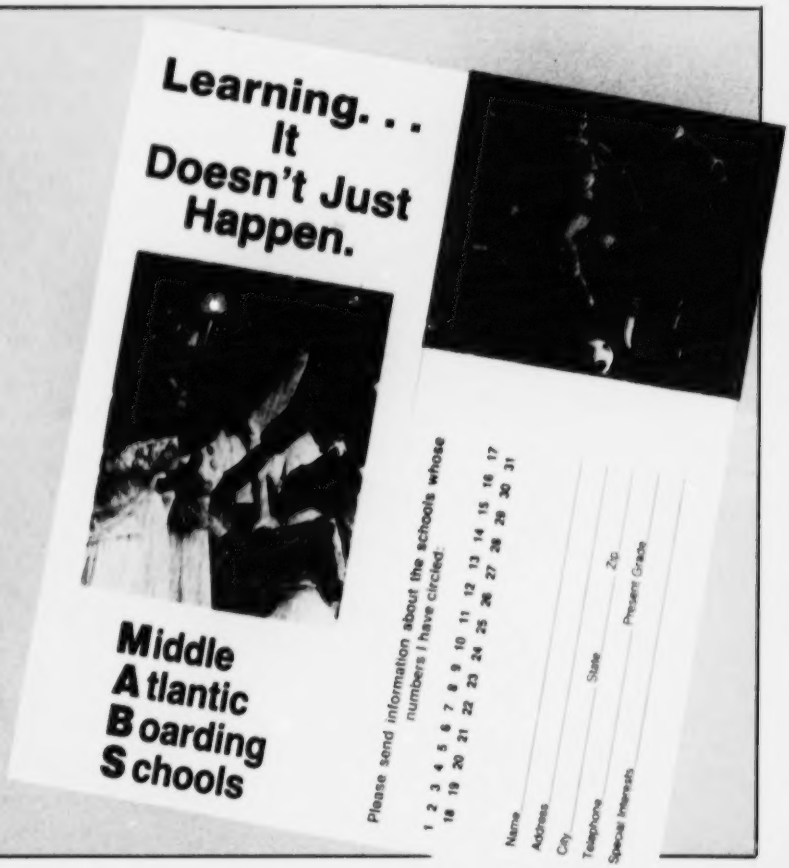
The Philadelphia Area Admission Directors (PAAD), "a regional professional organization that promotes admission to Philadelphia area independent schools and coordinates activities which enhance visibility for schools and access for families," has in its five years of existence established a formal committee structure, offered teachers and administrators professional support and training in admissions and marketing, published directories listing the 38 member schools, collaborated on a common entrance examination and recommendation form and established a calendar of coordinated testing dates. More recently, with a serious decline in the applicant pools, the schools have become more focused on attracting new students to their marketplace.

In the past year, the group has been considering a series of bold moves. The schools, believing that each would benefit from collective strength, proposed to 1) "define membership more clearly, incorporating as a nonprofit professional organization and seeking funds to implement the goals of the organization"; 2) "develop collective enrollment strategies which support and complement those already in place at individual schools"; 3) "employ staff who will assure that independent education and these schools receive invigorated visibility." The PAAD proposal will not be decided upon for some time. However, the Philadelphia area school admission directors see the rising cost of independent school education, the improved public perception of a public school education, a decreasing population of middle- and upper-school age children and the declining numbers of ERB and SSAT test takers as indication that schools must work together to broaden the market in seeking new students.

A girls boarding school is a place where you can SOAR

A colorful poster promotes the cause for 9 girls boarding schools; postpaid postcards provide an easy response device to send for more information.

Learning . . . It Doesn't Just Happen, **a brochure produced by Middle Atlantic Boarding Schools (MABS)—thirty-one schools in Delaware, the District of Columbia, Maryland, New Jersey and Pennsylvania—draws attention to schools in a region with a long-standing though often underacknowledged tradition of providing quality boarding education. Before completing the thoughtful and thought-provoking piece, MABS ran into difficulties with financing, geographic definition of their region, stretched lines of communication and brochure committee personnel changes. Originally begun in 1982, the brochure debuted in the spring of 1987 and was sent to public and private guidance counselors nationwide, independent schools in the States and abroad. Response in the first three months totaled 105 tear-off response cards. Respondents indicated interest in some or all of the 31 schools, expressing their desire to receive information from the school(s). Inquiries totaled 1161 (from 105 cards), with each respondent circling between 7–31 schools on the cards.**


Learning. . .
It
Doesn't Just
Happen.
Middle
Atlantic
Boarding
Schools
Please send information about the schools whose numbers I have circled:
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
Name
Address
City State Zip
Telephone Present Grade
Special Interests

The Girl Groups: Singing Their Own Special Songs

The Committee to Support Girls Boarding Schools (CSGBS) was formed to act on concerns that the large number of coed boarding options may eventually eclipse the all-girls schools, draining enrollment and putting these institutions at risk. The time had come to make the case for the single-sex schools' advantage, and a group from nine girls schools located in New England, New York and Virginia met in June 1986 to develop a strategy to take its case to the public. The meeting spawned an organization which has since established by-laws, elected a chair, produced and mailed a poster, discussed and begun planning joint advertising in national magazines including *Seventeen, Town and Country, New York Times Magazine* and *Wall Street Journal*, discussed placement of stories in the national press and begun planning joint travel.

The poster served as a point of departure for disseminating information about girls schools and raising awareness about the advantages of single-sex education for young women. Targeted primarily at 12,000 public middle and junior high school counselors and librarians in 12 selected states, the piece yielded 830 requests for information in the first 4 months of its circulation. Potential applicant response was not considered initially strong, but one school reported two in process applications in June 1987. Response from 46 guidance counselors suggested that members of the group should plan follow-up visits with these people. The modest response may be related to the young age of students at the schools targeted and the group is hopeful that seeing the poster will plant seeds that can be cultivated when these girls are of age for boarding school.

The schools each committed $3,000 to fund the poster and suggest that while this seems a costly outlay, the inquiries (generated at approximately $5 per school) and increased awareness of the viable opportunities offered at girls boarding schools will justify their considerable expenditure of time and money. Members of this group have noted that galvanizing support for their cause from the nine founding members of the CSGBS was no easy task. Commitment on funding presented problems; shared responsibility for directing the group's overall program has proved inefficient; and questions of appropriate group size, qualification for membership and geographical limits to membership caused much discussion and controversy both among the founding schools and others not invited to join CSGBS. Directors of admission had difficulties convincing their heads that the $3,000–$4,000 financial commitment could be cost justified. Pressure to derive short-term enrollment gains from the initial poster mailing may cause several admission officers heartburn.

Rotating leadership, initially favored by the group, allowed each member school to serve as host for a particular meeting. Personnel at the host school were responsible for setting that meeting's agenda, the host school's director of admission serving as chair/secretary/treasurer for the group until the next meeting. Interim leadership proved to have its drawbacks as no one leader was ever specifically empowered to direct the organization's overall program. Membership was initially based on momentum; members of the nascent group welcomed those who could come to the first meeting, commit funding and generally agree on what the CSGBS would endeavor to accomplish. More recently criteria for membership have been addressed in the bylaws, and in future the group may include girls boarding schools which belong to NAIS, offer a residential program to more than half of their students and represent a national student population.

The traveling partnership of Five Girls Boarding Schools began last year when the directors of admission at Foxcroft, Garrison Forest, Oldfields, St. Timothy's Schools and Salem Academy joined forces to make their own case in support of girls schools. Together these five schools hosted successful receptions in Atlanta, Houston and Dallas. Two hundred invitations were sent to counselors, inquiring families and friends of the five schools. Both parties were well attended, oddly enough not by those invited, but by friends and acquaintances to whom they had passed word of the events. The schools with previous experience recruiting in Texas had never experienced nor did they expect the degree of interest shown. One school enrolled two girls through a reception. This school's director of admission commented that "the number of families reached through our jointly held gatherings in Texas was geometrically higher (than previous individually held gatherings) because we were discussing ideas of general relevance and not an individual school's programs. Our outreach works well because we serve families."

The Committee to Support Girls Boarding Schools was formed to act on concerns that the large number of coed boarding options may eventually eclipse the all-girls schools, draining enrollment and putting these institutions at risk.

Some Variations on the Theme: Not All Independent School Collaboratives Seek Total Independence

The Seattle Area Schools group, formed ten years ago to offer joint admissions testing, began organizing and advertising an informational secondary school fair in 1985. The five member schools, Bush, Lakeside, Overlake, Seattle Preparatory and University Preparatory Schools also asked 17 other local Christian, parochial and public

high schools to assist them in familiarizing parents and students with *all* of their options. The fairs have been highly successful, generating goodwill and better understanding among schools and families. The upsurge in applications resulting from the fair has helped hold enrollments at these schools who have experienced the predicted demographic declines in the present number of 7th and 9th grade students.

Research before Outreach

The Western Boarding Schools Association has decided to collectively undertake a demographic study and analysis of family and student needs and expectations for education in the Western states (Arizona, New Mexico, Texas, California, Utah, Nevada, Colorado, Oregon, Idaho, Wyoming, Montana, Washington, Hawaii and Alaska). Because the majority of families with whom the admission officers work are previously unfamiliar with the offerings and advantages of independent education, much of any initial conversation with a family covers assessment of their needs and expectations for the child's education. Admission officers spend a lot of time as educational consultants trying to direct families to appropriate educational settings, not necessarily that provided by the school they represent.

For the past three years, the group has collectively organized and run informational school fairs aimed at promoting general awareness of Western boarding schools, but increasingly members of the group have become concerned that fairs may not be the correct vehicle for communicating with the families they want to influence. While fairs present an opportunity to reach a broad cross section of the population, they may also be a shot-in-the-dark approach to informing the public. The group's current chair anticipates that market research will turn up alternative strategies for identifying, targeting and informing nontraditional markets of prospective students. It is probable that the research will promote solutions familiar to most members of the group. However, the individual members of Western Boarding Schools feel that it is important to streamline and systematize strategies for reaching the most appropriate candidates for their schools, and this starts with market research and analysis.

If you are interested in starting collective marketing efforts . . .

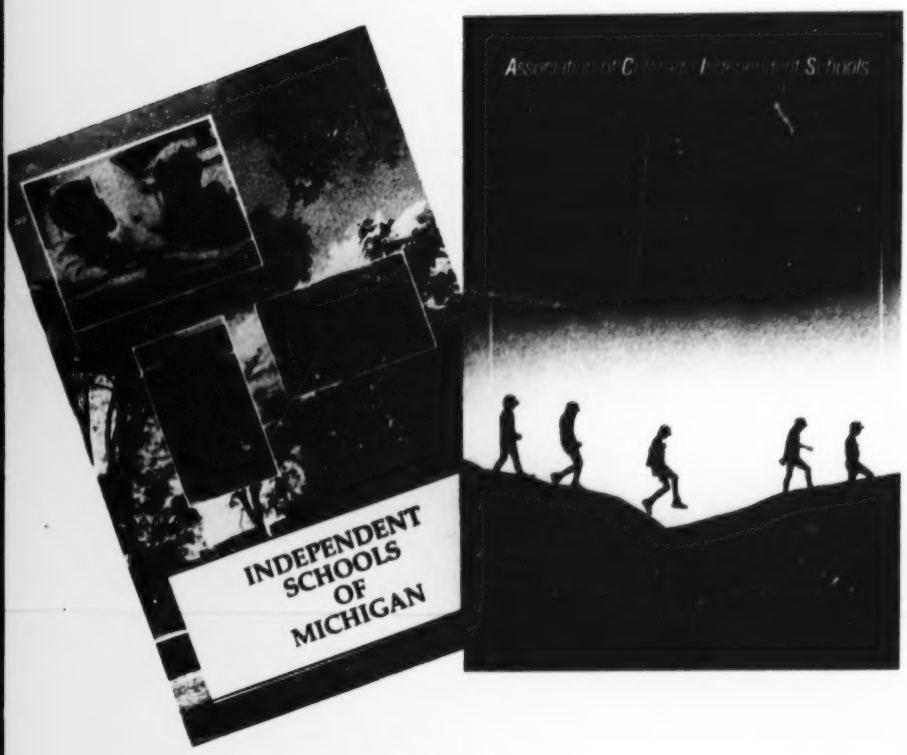
- **Assess your school's individual marketing needs, then compare these with neighboring schools or schools with similar programs to determine any possible areas of overlap and mutual interest.**
- **Brainstorm the types of joint projects your group could undertake.**
- **Clarify your various expectations for collaborative efforts and set reasonable, measurable goals for yourselves.**
- **Determine what structure and leadership your group favors and identify the responsible group spokesperson(s). Don't presume upon the generosity and energy of your leading volunteers without agreeing upon their roles and setting limits for their efforts.**
- **Establish deadlines for whatever projects are undertaken; maintain constant communication among group members.**
- **Fund the organization with pre-established dues levied on all members of the group.**

Minority Marketing Efforts: Recruitment to Promote School Mission and Social Equality

Six schools, now called the Advocates for Minority Education in Independent Schools, got together in 1986 for the purpose of informing the sizable minority population in the Winston-Salem, NC area on independent school options and increasing their interest in this kind of education. Admission officers, originally seeking answers for the under-representation of minorities in their schools, entered into discussions with minority parents and community leaders. They found, in discussing the images of their schools, that many blacks were unaware of school programs and held neither strong negative nor positive feelings about the independent schools. One past parent, a prominent black educator and minority recruiter for the local medical school, volunteered to work with the group of admission officers to organize and publicize a panel presentation at the Winston-Salem Urban League. An active press release campaign, as well as many excellent personal contacts afforded the group by the past parent's network, led to interviews, articles and major pre-event coverage—in the local newspaper, on a radio talk show whose audience was largely black and on a news spot for the NBC-affiliate.

Channels for Educational Choices

The Admissions Officers Association of the Independent Schools Association of Massachusetts (ISAM) began discussions a few years ago about improving minority representation in member schools. The initial plan to hire a minority recruiter for ISAM was scratched in favor of establishing a broader program of minority student recruitment and support, Channels for Educational Choices. The program's operational costs are to be supported for the first three



years by annual membership fees now contributed by over 50 schools (42% of ISAM's members). The cost per school varies between $250 and $2,000 depending on the school's operating budget. The director is responsible for 1) recruitment, admission counseling and referral of minority candidates, 2) outreach and networking in minority communities (specifically, Boston, Springfield, Lawrence, Lowell, Haverhill and potentially New Bedford) and 3) consultation and support for sponsoring schools addressing issues of diversity as related to curriculum, student life, parent involvement and minority teacher recruitment and retention.

Initial efforts to recruit minorities through Channels have benefited 20 out of the over 50 schools involved, and the director has been able to offer other nonrecruitment services to eight other schools. One selective school has taken six Channels' students and an elementary school accepted three. Proximity to the minority communities and public transportation works to some schools' advantage. Other schools complain that they have not received the benefits they had expected from their participation in the program. The director realistically says that systemic change must occur at many schools in order for them to serve and in turn attract and retain minority students. If a school is not providing an environment that is supportive of minority needs (as well as nonminority needs), it cannot hope to make permanent gains in increasing the numbers of minority enrollment despite participation in a program like Channels.

Further, the Channels for Educational Choices organization faces funding problems. Future plans include seeking financial aid monies from corporations and foundations to make independent education more accessible to the lower income student. At the same time there is the hope that schools will continue to set aside funds for Channels-referred students. In reality, only those deeply committed to diversity in their student population will ultimately be able to justify the support Channels requires.

Conclusion

Collaborative efforts initiated by admission people have been our focus in this chapter. However, examples of program-oriented collaboratives undertaken by other groups within schools are readily available. Any school athletic league becomes on some level a marketing arm of the schools in its membership. Five years ago, development officers from Boston area schools formed the Alumni and Alumnae Alliance of Boston Independent Schools for the purpose of sponsoring joint reunion parties in cities nationwide in which no one school had enough alums to sponsor a successful gathering of its own. Collectively, the 26 current Alliance members have a total alumni(ae) population of 40,000. Many of the schools find their resources would never enable them personally to reach these graduates, but as members of the Alliance, they have recently visited their alums in Portland, ME; Washington; New York; San Francisco; Los Angeles; and Greenwich, CT. Parties are well attended, though not dominated by one school. Partiers have the chance to catch up with some old schoolmates and athletic "rivals," as well as people they met socially. These alums return home with the feeling that their school is still doing something for them, that they are part of a larger school community. Very often this spurs the alum to renew contact with his or her alma mater, as well as greater interest in all independent schools.

For those interested in further details about the school collaboratives mentioned in this chapter, NAIS Director of Admission Services maintains a list of regional admissions associations complete with the contact names of the groups' current leaders. All have expressed willingness to discuss their experiences with others interested in the subject. Similarly, NAIS and Boarding Schools are interested in hearing about the multitude of collaborative efforts being undertaken each year and welcome comments from those involved in them.■

Chapter 5

Creating the Tools of Promotion

Part I Publications

Carol L. Cheney

One major way in which schools communicate with the public is through publications and other printed materials. From the school letterhead to the monthly newsletter to the all-important recruitment brochure, signals are transmitted about a school's identity, what it does and how it feels about itself as an institution. For many schools, the job of producing basic materials "to keep the place running" is passed out among several individuals, and no real thought is given to the combined impact of the school's publications taken all together. Now is the time to begin to coordinate the publications effort with the overall public relations program in response to the objectives developed from marketing studies about the school. No longer can schools afford to produce haphazard printed messages, but to unify the graphic image of the institution to reflect a well-orchestrated school management.

Corporate Identity—The Logo as a Symbol of the Mission

Reflecting on the corporate world, it is possible to see how huge, complex and impersonal enterprises can come to have positive associations through the use of trademarks or logos, as they have come to be called. The mark or symbol helps characterize the institution, presenting to the public a face, or personality.

Trademarks have a major sales function, and logo designers are likely to begin their work with a researched statement as to which segments of the population the emblem is supposed to serve and what characteristics of the organization it should convey. Some successful logos have become a meaningful part of American tradition, such as "Mr. New Yorker," designed in 1925 and subsequently never changed.

Other logos and trademarks are altered subtly as graphic preferences change in order to remain fresh and current; think of Shell and The Hartford. McDonald's has gained such vast exposure that it is firmly a part of American culture. The corporation can afford to use much smaller (less expensive) golden arches than before because name recognition, the key ingredient, has become virtually automatic.

In recent years, the energy focused on logos for nonprofit organizations is frequently of the same intensity as that for the most elaborately researched and financially supported corporate identity program. For one thing, today's public has a greater appreciation of typography and sophisticated graphics than in the past. For another, competition for the attention of potential "consumers" has grown immeasurably; indifferent graphics can lead to invisibility.

Growing into a New School Logo

A designer for a new school logo or trademark would consider that it will be worn on athletic uniforms, patches and t-shirts and will be printed on letterhead, notebooks, blankets, mugs and jewelry. The logo will be used for advertising and recruitment purposes. All of the potential applications involve psychological and technical criteria. The logo design must reflect the dignity and tradition of the institution as well as its forward-looking aspects. It must be sophisticated enough to convey the idea of quality education and yet not be stuffy. Technically, it must be simple enough to be reproducible in many forms and yet keep its design integrity and clarity. It must be legible and memorable.

Many schools are still relying on outmoded shields or seals as their corporate trademark; lamps of learning are abundant as are arcane Latin mottoes, while school names are virtually illegible. What images

New school logos

WESTTOWN SCHOOL

UNIVERSITY LIGGETT SCHOOL

Hawaii Preparatory Academy

PROCTOR

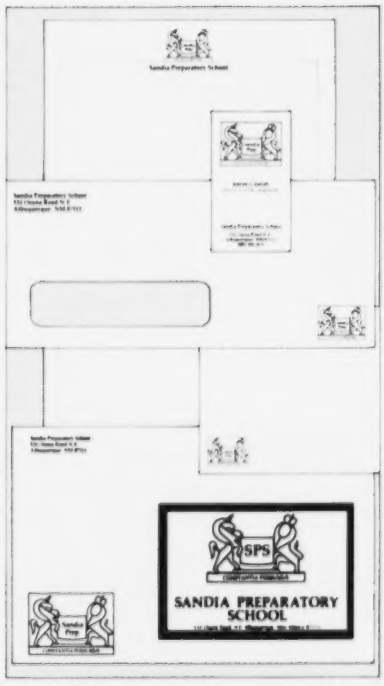
the elmwood franklin school

do such symbols conjure up? One thinks of clans and exclusive family ties—just the sort of posture most schools are trying to move away from. Recognition of a *specific* institution with particular characteristics may be discouraged rather than facilitated by these emblems. Perhaps a more positive approach for a school developing a new logo is to select an architectural detail from the campus that has some meaning to its graduates; a symbol of education; or a graphic rendering of letters in the school name to represent (at a glance, in a nutshell) the current school's personality and mission. The design must necessarily take into account the audience the school is trying to reach and what its response will be to the image making.[1]

First Impressions: The Staples

Keeping in mind that many of the principles governing the design of an institutional symbol hold true for other printed matter, it may be useful to consider the first impressions schools make in their publications.

1. Based on ideas in *American Trademark Designs* by Barbara Baer Capitman, Dover Publications, Inc., 1976.



Coordination of the staples as to type style, color and logo is a must if you want your school to appear as a single, unified institution.

An institution's letterhead should be on good-quality stock, and all pieces (8½ x 11 sheets, Monarch and note-size sheets, envelopes, mailing labels and so forth) should match as to ink color, type style and rendering of the logo. Schools who fail to coordinate the basics not only communicate managerial ineptitude, but also probably duplicate orders and spend more than they need to. Plan in the summer the coming year's stationery needs for *all* departments and have everything printed together. Outdated stationery should be recycled as notepads or thrown out.

How does the school's mail look when it arrives in a prospective family's or graduate's mailbox? This is the first-first impression. Envelopes should have either a printed return address (plus appropriate graphics) or a mailing label with same. Not both. The use of a postage meter slug with an educational message offers schools an inexpensive way to make an additional positive statement right up front. Color and bold, large type help a school's letter or admission package stand out from the rest of the mail.

Those wishing to give up a letterhead that is old and tired should begin collecting samples from various organizations that make an impact—either positive or negative. The seed of an idea can emerge from analyzing colors, type styles and formats that one likes or responds to with a ho-hum or a strong negative shrug. It is a good

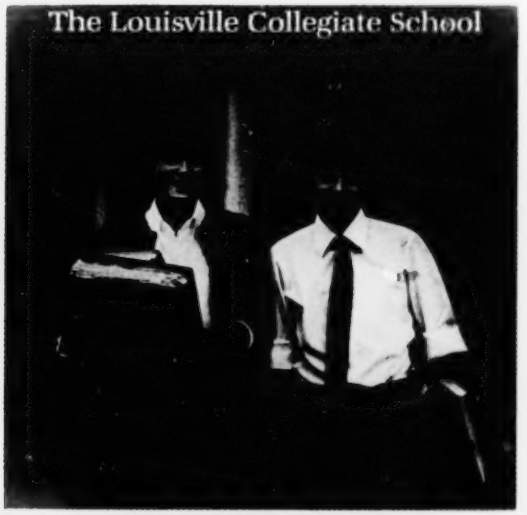
investment to employ a professional designer for help in executing finished artwork for a logo/nameplate that best represents the mission statement as researched in the first marketing phase.

First Impressions: Covers

More "first impressions" are made by what schools choose to show on the covers of publications. Too often the photo files are deficient and compromises are made in considering what kinds of visuals will work best for the audience the school is trying to influence. Many schools opt to use a photograph of a building as the introduction to a student recruitment piece. Such a choice is "safe"—one can avoid worrying about getting exactly the right grouping of students captured on film. But, such a choice may not be the effective one.

Louisville Collegiate School abandoned a 4-color doorway shot, which was a nice photo, in favor of a photo of two students looking straight on at the viewer. The school did some research first to find out what kinds of photos are most appealing to the families the school wished to reach, and the vote came in for people, not doorways. Quite a lot of information is conveyed through the photograph and without any need for words. One can see that the school is coeducational, that academics are important (as evidenced by the big loads of books the boy and girl are carrying), that there is structure and order (the students are in formal dress code) and that people are happy there. The architecture of the school is hinted at by the inclusion of the archways in the background. The head-on posture engages the viewer with a sense of forthrightness and an implied invitation to "visit" the campus in the pages of the brochure.

A successful building cover was used for some years by Concord Academy (MA). The mezzotint of one of the school's old buildings creates a mood of place and time on the catalog cover. Concord, Massachusetts is a town both of literary and historical significance, and one gets a sense of antiquity and the importance of setting through this cover illustration.

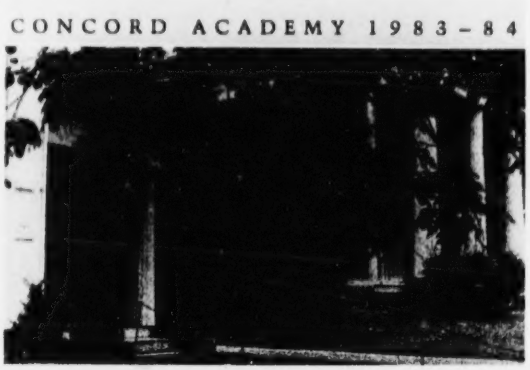


Louisville Collegiate School (KY) abandoned a 4-color doorway cover photo for a more appealing shot printed as a duotone.

Some schools try to show too much on their recruitment brochure covers by including several photos of typical activities. In this case the reader's eye may notice more the arrangement (or confusion) of the photos rather than focusing in on the content of the photos. From a marketing standpoint there is an inversion of importance in terms of what is important to the customer, with the focus on facilities and activities rather than on benefits to the buyer, as discussed earlier in this handbook. In computer lingo, the aim is for "user-friendly" pictures. In commercial advertising, the photos sell the "sizzle," not just the steak.

Other schools show too little on their covers by simply running the name of the school and perhaps the logo on a colored background. Graphically this may be a missed opportunity to introduce a school to its readers through the use of stimulating and visually pleasing illustrative material. It is important to keep in mind the other catalogs a family is likely to have from competitor schools when one's own arrives on the scene. The cover should stand out and make a strong, immediate impression if it is to effectively influence the reader to open the piece up and begin reading.

Schools should avoid using illustrations on covers that are difficult for the reader to understand. One school used for its cover a graphic of two students standing on a sculp-



Concord Academy (MA) used a mezzotint of one of the school's historic buildings for the catalog cover.

ture. The colors and rendering of the graphic are such that the cover takes on a surrealistic, dreamlike quality, transmitting a message of strangeness to the reader.

Assessing the Cover Photo

Most schools never win awards for their publications, but they still must face the most important jury of all, the audience they are trying to influence. How many schools have taken the time to conduct a market survey to measure people's reaction to given publications? Now is the time, *before* producing new materials, to learn how students and parents respond to different kinds of photos and graphics.

One trap schools often fall into when planning a cover is choosing photographs of students who are well liked or otherwise exemplary citizens of the institution. The familiarity and foreknowledge of who's who in the photos should not take precedence over the photos' technical excellence. Is the composition well balanced, is the lighting good with a range of tones from light to dark, are the people in the photograph relating to each other, do they engage the attention of the reader? Schools should save their superstars for newsletters or magazines in which there is chance to editorialize about achievements. The audience looking at a recruitment piece will relate not to the identity of those pictured but how people are shown and what the composition of the photos says about the institution.

Putting Photography on the Calendar

Planning for photography should be on the agenda for public relations meetings, when those in charge sketch in events, story ideas and other communications for the coming year. It is not enough to rely on the yearbook staff to document school life or to haphazardly shoot special events and expect to have adequate material on hand to illustrate new publications. The interaction of students and

Getting Your Photography Together

Photography should be a line item in every school's annual budget. Freelance photographers charge anywhere from $250 to $850 @ day, plus film, processing, contact sheets and printing. They expect to have travel and living expenses reimbursed. 5 x 7" prints are adequately large for general use.

Try to persuade your photographer to allow the school to retain ownership of the negatives for your permanent archives.

Book the photographer well in advance of the time you wish him/her to visit your campus. Plan what you want photographed, notify teachers of the upcoming disruption and plan to assist the photographer around the building(s). Ask the photographer to shoot black and white film for publications (slides for an A-V program). Some can shoot both kinds of film concurrently if you are unsure of the final use. Avoid use of direct flash, which looks unnatural, to boost available light.

Edit contact sheets carefully—use magnifying glass and grease pencil (can rub off with tissue) to indicate the frames you want printed. Make sure prints are keyed to contact sheets for future reference (photographer's name, date of shooting and subject) for each print.

To prepare photos for use in a publication, tape photo to sheet of paper and then cover with a rectangle of tracing paper. Indicate cropping on tracing paper, not on photo. Do not *cut* photo; you may want to use it again.

Keep photos in central place (not some in admissions office, some in alumni office, some in yearbook office). File prints by subject alphabetically, with a cross referencing system to contact sheets. File contact sheets chronologically with an index of subject matter. File negatives with contact sheets if you own them. File transparencies (slides) in plastic sleeves with date, subject and photographer written on slide mount. Use students to keep your files current.

Subjects you should have on file in the permanent archives—KEEP CURRENT:

Dated Events
registration
student/faculty orientation
convocation
volunteers weekend/orientation
parents/grandparents day
project day (school service)
"mini" term special activities
telethons
senior dinner dance
cum laude and prize ceremonies
alumni day/weekend
commencement

Other Special Events & Activities
student productions & recitals
art exhibits
special guest speakers
club-sponsored events
fund-raising events (on/off campus)

Academic & Campus Life
community service
classes & special projects
library/computer
leisure activities/dorm life
students—faces
faculty/student interaction
architectural details, campus

Sports
EACH season
coaching
athletic equipment

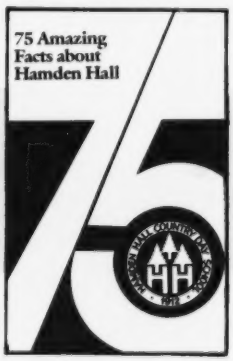
Biographical
faculty (all faculty)
trustees and volunteer leaders
academic, sports & student government leaders
members of the nonteaching staff (clerical, buildings & grounds, kitchen)

Summer School/Extended Day Programs

students, students and teachers, classroom activity, extracurricular activities, school facilities and so forth must be caught on film on a regular cycle and then carefully and systematically printed and filed for future use.

Schools may be able to release a talented faculty member from some teaching duties to take on this important responsibility, or they may have access to a photography student at a nearby college or university. Perhaps there is a professional parent or graduate who is willing to give this service as a gift to the school.

Otherwise, a school should hire a professional and plan that person's time on campus carefully to maximize the investment. Costs range from $250 per day to $850 per day + costs for film, processing, printing and out-of-pocket travel expenses. Try to convince the photographer to allow the institution to retain ownership of the negatives to become part of the permanent pictorial archives. In this way, when prints are needed next year or the year after, the school can get the printing done on its own without having to go through the photographer (do give credit in the publication). At the same time the school will be building a visual history of the institution.



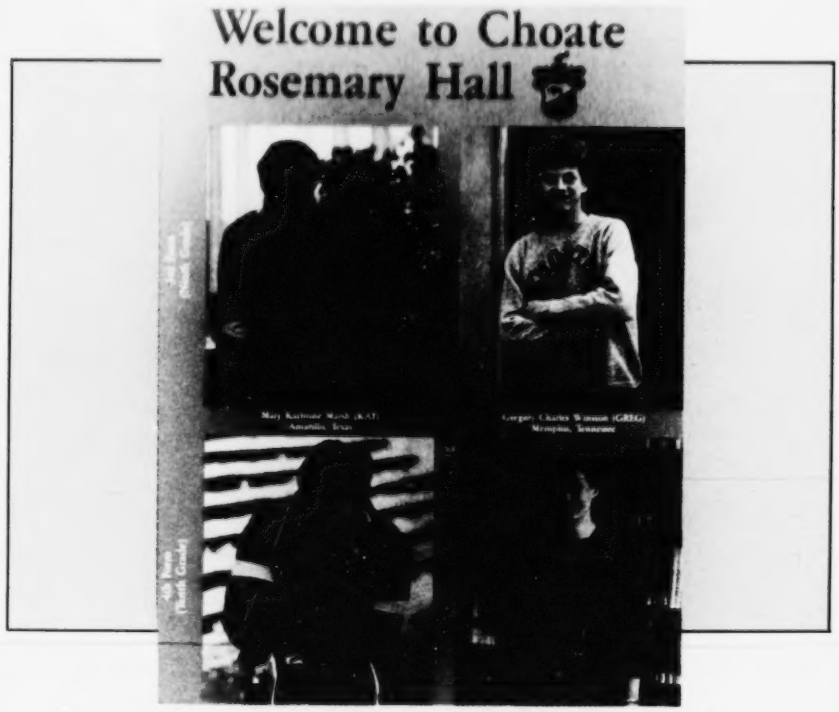
"75 Amazing Facts" introduced Hamden Hall (CT) to readers through a series of 1- or 2-sentence highlights about people and programs.

One Recruiting Piece or More?

One effect marketing research has had on school communications is to move away from the all-information-under-one-cover approach in recruitment publications to creating a set of pieces directed at specific audiences and/or addressing specific topics. The centerpiece of one configuration is a viewbook with carefully written, concise text about the personality of the school, its mission and the kind of people it serves, accompanied by testimonial statements about how individuals feel concerning their experience at the school. These statements can be powerful stuff. The viewbook is planned for a two-year or three-year life span and generally includes an abundance of excellent photographs, a map and directions on how to get to the school and a campus plan (to help people get around once they are at the school).

The viewbook is supplemented by general information updated annually—course offerings, a calendar, a list of faculty and trustees, academic, sports and other awards, the daily schedule and so forth. Sometimes this information is in a separate piece, sometimes it is bound into the viewbook, or it can be tucked into a flap or pocket in the back of the viewbook. Careful consideration should be given to making these pieces coordinate in color, type style and general layout.

Some schools are producing search pieces—information flyers with built-in response devices—to generate inquiries from new target audiences. All a reader has to do is tear off a business-response postcard and mail it back for further information on a school's program. Such a direct-mail approach may help increase the applicant pool and stimulate greater name recognition in the community. A similar piece is a poster with a pad of postcards attached, providing the reader with an easy way of getting in touch with the school. Such publications should be planned in conjunction with the advertising program and should be followed by direct contact from the school. Information flyers can be produced on a modest budget and can be distributed in large numbers in the community or when an admission officer is on the road.



Choate Rosemary Hall (CT) wooed accepted students with a fold-out poster featuring 16 students and their statements about why they chose the school.

What if the School is Full?

Some schools who are enjoying maximum enrollment, especially at the lower grade levels, worry that it is "false advertising" to spend money on nice recruitment pieces when they have only a few places open and do not wish to stimulate applications only to disappoint a family by saying "No room in the inn."

They should keep in mind, however, that a viewbook or catalog by itself will stimulate very few, if any, applications. It is but one tool used in a coordinated sequence of communications. It is important for a school to document itself in print. Schools are corporate entities with histories and important missions. If a school expects to have a presence in the community (both in the neighborhood and in a community of colleagues), it must be substantiated to the public in a professional looking publication or set of publications.

The exercise of framing a mission statement and finding ways to illustrate it through photographs or artwork helps to bring different elements of the school closer together in their understanding of what they are working toward both today and in the future. The feeling of pride that grows from the inside will project beyond the school's walls and make a positive impact on the world beyond.

When to Publish

The *best* time to plan a major publication for recruitment is when the school is in a healthy state, not during a crisis period when the budget is treatened due to poor retention of students or other problems. Just at the moment a school thinks it can postpone a publication project "because things are going so well" is when administrators should be planning a strategy on how best to market the school to the audiences it wants to reach.

Schools must step back from their publications and analyze their objectives for producing them in the first place. Whom do they wish to reach with a given piece and what would they like to have happen as a result of someone reading the piece? When and how will they distribute a publication or series of publications? Who should be involved in helping draft the text? Should a publication be accompanied by a letter? Should it be mailed first class or bulk rate?

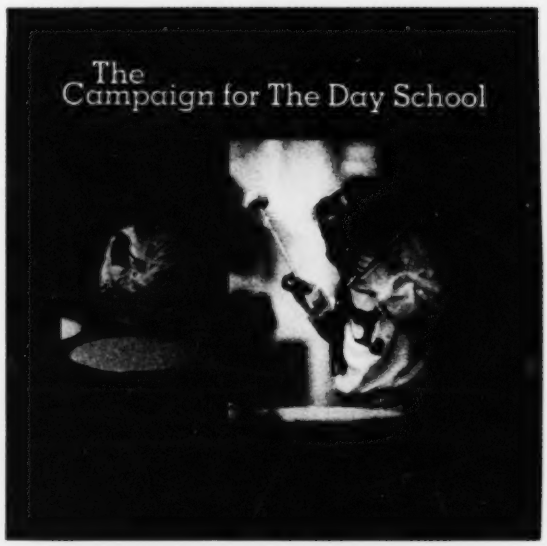
Consider mailing new recruitment materials to alumni/ae with a covering letter from the head saying "We thought you would like to know about the exciting things going on at your alma mater in 1987. As you will see, many wonderful new programs have been introduced, but the flavor of the place and the fine caliber of the teachers is just the same as when you were here. If you know of a family who might be interested in hearing more about what we're doing, please pass this along or call us to get in touch." Such a mailing allows a school to communicate with graduates in a way that does not appeal for money, which informs them about the school's current program and which may yield some referrals.

Schools should also pay more attention to internal distribution. How many faculty members are given copies of new recruitment pieces as soon as they are released? Teachers are likely to pass information on to members of the community if they have access to the materials. Also, "seeing oneself in print" is a source of pride and satisfaction *within* the school community.

Recruitment pieces also become part of a school's press kit and can be used effectively by development officers in proposals to foundations and top donor prospects and by phonathon volunteers to help them have ready access to current information about what is going on at school.

Every School Publication is a Recruiting Tool

Just as there may be new ways to use recruitment pieces for "nonrecruitment" purposes, so too a school can use magazines, newsletters and annual reports to enhance its recruitment efforts. Articles in the school periodical can help clarify a school's image and bring people up to date on programs offered. If in its image analysis work a school discovers that the public perceives it as being too "artsy," the school may choose to run some stories on science (or math) to help balance things out. One can find out who among the alumni/ae are involved in science as a career and include a profile or two.
If one's main competition is the



The Day School's (NY) capital campaign brochure boldly captures good education in action and lets new families, too, know about the school's commitment to improve faculty salaries, financial aid and facilities.

local public schools and they are deficient in music and drama, a school can underscore its strengths in these areas in the newsletter or magazine, showing off the positive ways in which it is different. Schools should send periodicals to candidates' families as another way of communicating and to inform them of the year's activities; don't wait until a new student has come aboard to put the family on the mailing list.

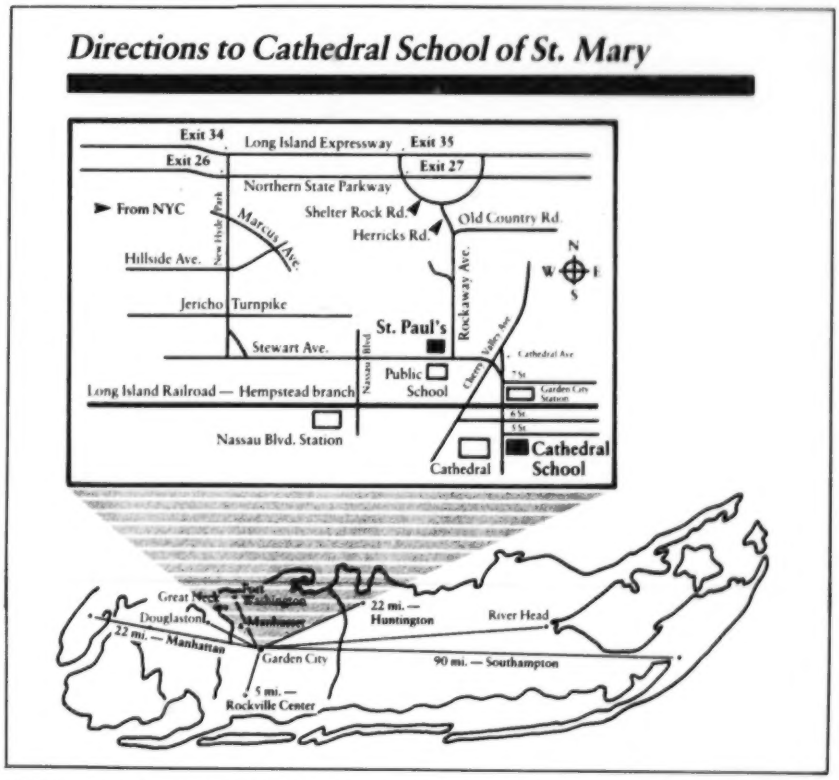
Annual reports provide schools with a wonderful opportunity to thank donors and volunteers and also to let prospective families have a glimpse at the people who really care about the institution. They will be favorably impressed by the trustee list and others who contribute both time and money to give the school that margin of excellence in programming which cannot be supported by student enrollment alone. Such early lessons in voluntary support will pay off later when it comes time to educate first-generation independent school families as to a school's expectations beyond the obvious tuition payments.

Schools should consider joining together with others to produce a piece that will give each participating school visibility in the wider community and a contact for further information. Such a collective strategy has positive public relations value for all independent schools and helps individual schools get the word out without having to make a major expenditure.

Please read Mary Will's excellent chapter on this subject beginning on page 34.

Who Puts It All Together?

No matter what the publication, joint effort within the school should go into its making. The isolation of one office or department from another in planning the school's image making will show in the final result and can result in fragmented or blurry statements about who and what the school is all about. Stationery items, annual appeals and reports, admission pieces, advertisements, magazines and newsletters are all part of a larger effort to secure the future of a school through effective communication based on tried and true marketing techniques.



Help people find your school easily by providing good directions and a map. Accessibility is important — especially if you are seeking students from new neighborhoods.

More than likely a school can do some or most of the editorial work necessary to produce an effective recruitment piece or pieces. Typically the writing is done by faculty division or department heads. General information, such as the history, educational philosophy and college placement record, is supplied by the admission director and/or head. One person with editing experience should coordinate the total manuscript to guard against a toneless, writing-by-committee text. Development officers can bring a fresh eye and their experience with the school constituencies to recruitment copy. They should be involved throughout the process.

Any major changes in program or facilities should be anticipated in the copy to avoid producing a new piece that will go out of date soon after coming off the press. For instance, one school wisely postponed producing a new three-year viewbook until the trustees ratified recommendations from the long-range planning committee to make the sixth grade part of the middle school rather than the lower school.

Taking the Reader's Interests to Heart

Throughout constructing a new text, careful thought must be given to public relations problems and pluses, and the school should take care not to overstate or exaggerate in an attempt to lure families to apply. A school must be able to deliver what it promises in print or risk being sued for false advertising.

Those working on the text must also remember that the finished product will fall flat with its audience if it is not written in a way that anticipates their questions, concerns, needs and motivations. It is important to keep in mind the ever growing numbers of first

generation independent school families applying to schools; these people may have only a vague or incomplete understanding of what independent education is all about let alone an interest in a specific institution.

The admission process should be made as unintimidating as possible, in this regard. People should feel welcomed to a school, not just when visiting, but in the publications as well. Many schools forget to take a critical look at their application forms when updating or creating new recruitment publications. Questions such as "college or university attended by father/mother," "religious affiliation" and even "relatives who have attended the school" may send out strong negative signals about a school's commitment to enroll students from diverse backgrounds. The mother or father who has not attended college and has no relatives connected with the school may fear that these "inadequacies" will harm a child's chances of being accepted. Schools should ask only for the information they really need to support the admission process—there is time later to find out family information on enrolled students that will be helpful to the development or dean's office.

Bringing on the Pros

Because a school's publications cannot afford to have the loving-hands-at-home look, the institution will be well served by working with a professional graphic designer in assembling new publications. The technical know-how and production contacts, as well as the creative touch that is the province of the designer can combine to put that carefully worded text and new photography into a smashing graphic "package" in ways that would be difficult or impossible for a school staff member to accomplish.

Get 3 bids on big jobs. Ask about turn-around time. Give printers identical information and ask for their quotes in writing. Plan ahead and you'll save $$$.

Publications Budget Planning

The following information is needed in order to obtain an accurate estimate of the costs of producing a new publication. If you do not know exactly what the piece(s) will look like, choose a sample of an existing publication that is similar to the one you are planning and use it for the basis of your fact finding.

Print Run
The quantity you want printed (make sure to account for distribution within your school and for use by other than the originating department). Printers can give you an option for printing additional copies at a @ thousand or a @ hundred rate. Save 5 samples for your records.

Flat Size
Dimensions of the piece opened out, including flaps or pockets. This information is important in calculating the amount of paper and press sheet size.

Finished Size
Dimensions of the piece folded and/or bound.

Number of Pages
Total number of individual pages (taken from the finished size) + cover, if there is to be one. If piece is a flyer, count panels front and back. Note: page numbers are even on the left and odd on the right; do *not* count inside front cover as pg. 1.

Binding
Number of folds, perforating if needed, how piece will be held together. Most common is saddle wire stitching (staples). Perfect binding gives flat spine, with pages glued to cover. Also available is GBC binding (plastic comb), spiral binding, etc.

Stock
Paper choice for text and cover. Ask for options, as prices vary. Inquire about "house" stocks or "broken cartons" from other jobs. Coated paper is more expensive, but is the best surface for good reproduction of halftones.

Ink
Number of colors for text (black counts as a color). Printers use Pantone Matching System (PMS) colors—ask to see swatches. When printing 4-color, the term used is "process"—accents of combinations of black, magenta, cyan and yellow can be used with full-color photos. If heavy ink coverage to be used on cover, ask price for varnishing (matte or glossy) to seal. Get separate price for die cut or blind emboss.

Type
Get separate quote on typesetting and photostats.

Mechanicals
Get separate quote on preparation of camera-ready mechanicals.

Halftones
How many; will any require silhouetting? If you plan to use black plus a PMS color, the photos can be printed as duotones, combining the ink colors.

Transparencies or Color Art
If you plan to run something in full color, indicate how many individual shots will be in color and their approximate finished size. You must start with A+ originals.

Bleeds, Screens, Knock Outs
Will elements of design bleed (run off) edges of paper? Will you use tint blocks in graphs or charts? Will type reverse out (knock out) of black or a second color? Let the printer know, as this will require extra preparation.

Packaging
Bulk in cartons, or shrink-wrapped in lots of 50 or 100, etc. If you expect printer to collate and/or insert, communicate this information.

Destination/Delivery
Find out what shipping charges you will incur to get the job delivered to your school, the post office or a mailing fulfillment house. Get quote on fulfillment.

The school should interview printers, agencies or free-lancers offering design services to go over a prospective project. Preparing in advance for such meetings will enhance a school's chances of selecting the most appropriate professional for the job. The selection committee should have established the purpose of the publication; the quantity needed; how it will be distributed and over what period of time; budgetary constraints; when the publication is supposed to be delivered; graphic preferences. The committee should be specific in outlining what the school can provide (text, drawings, map) and what services the designer should provide (arrange for photography, design and paste-up, liaison with printer). Once a decision is made to use an outsider, a letter agreement contract outlining services, costs and schedule should precede the actual work. The same care in planning should be used in selecting a printer for a specific job for those schools who are able to do their own design work in-house.

One individual within the school should serve as the "conduit" or contact with the outside professional(s) working on the project. This person should be prepared to spend time during the summer bringing the piece or pieces to completion for release in advance of the new academic year. Some guidelines must be established by the school regarding approval—who will sign off on the copy and photo selections. Interference by well-meaning trustee committees and school administrators can add significantly to the cost and production time, while possibly diminishing or diluting the project's overall impact.

Doing It Desktop

Q. What is desktop publishing (DTP)?
A. Desktop publishing brings the processes of typesetting (composition) and preparation of the page make-up (layout and paste-up) together through the use of a personal computer. DTP is *not* a replacement for printing.

Q. How does DTP work?
A. First the text is typed in and corrected using a word processing program. Then, moving to a page format program, the copy is "poured" electronically into place on the pages using previously determined design guidelines. The copy can be rearranged or moved pointing a stylus at the computer screen.

Q. What kinds of projects are best suited to DTP?
A. Forms, schedules, newsletters, reports. For the operator with more experience, the system is effective for bigger jobs, such as viewbooks or magazines.

Q. Can anyone do DTP?
A. Anyone can learn to operate the personal computer that makes it happen, but without design training and knowledge of the conventions of typesetting, the job will look homespun.

Q. Is the quality of DTP good enough for all publications?
A. Laser printers print out copy with a resolution of about 350 dots per inch. Even the naked eye can detect some raggedness. But, the DTP disk can be played out in final through a Linotronic typesetter at 1350 dot resolution at a modest cost per page.

Q. Is there paste-up with DTP?
A. For jobs larger than 8½ x 11, laser proofs must be put down in position with crop marks in place. Photos must be cropped and sized. Errors missed along the way must be stripped in by hand. BUT, paste-up time is greatly reduced.

Q. What time savings is there with DTP?
A. The text can be input and corrected once—there is no need to rekeyboard and proof the "typeset" version.

Q. Does DTP save money?
A. Yes—if the equipment is yours. You will save on both typesetting and paste-up. But, if you have to hire out the DTP service, the savings will be modest at best, negligible at worst.

When the Job is Done

Once a publication is released for distribution, the school should assess its success from a number of standpoints: Did it come out on time? Is the quality of the printing and paper satisfactory? Did the job come in on budget? Is it being met with compliments by the audiences receiving it? Is the publication stimulating the desired response or action on the part of the audience? If the school had it to do over again, what would it change in the publication and/or the process?

Conclusion

Schools traditionally have shied away from "doing" public relations, publicity, advertising and more than the bare bones necessities in publications and printed matter. Schools also have responded negatively to marketing principles and terminology as being a lexicon of commercial mumbo jumbo appropriate for selling cars and cosmetics, but certainly not for advancing the mission of a nonprofit educational institution. The fact is, however, that schools ARE doing marketing and public relations every day they are in operation from the first day of the first year the doors are open indefinitely into the future. Are the current efforts really supportive of the ultimate mission of the school, or could they become more efficient, more complete, more unified and better executed? Very few schools can rest comfortably with the practice of putting out the same thing they did last year to keep enrollments full and secured for the years to come.

Schools wishing to strengthen their bonds with the community, to enhance their potential to serve a varied student body and to enlarge their resources—people, program, plant and purse, should think hard about how they describe themselves on paper. Putting "the theory" to practice offers school administrators and faculty, their friends and supporters, an opportunity to exercise the ingenuity and resourcefulness that have long characterized independent education.■

Part II The 'Lite' Guide to AV Marketing

Rick Cowan

What with everything from books to beer being marketed in 'lite' versions, perhaps the time has come for Boarding Schools to follow suit. Judging from attendance at SSATB and NAIS workshops and the number of people making advice-seeking phone calls, it's clear that many schools need guidance as they produce their first video or update an existing production. In an effort to satisfy the need for an introduction to the art and science of AV marketing, the following six precepts, the 'Lite' guide, are offered here.

Know Thyself

The process of producing a video poses a rather fundamental question: "Who are we?" Given the multiple constituencies of most independent schools—students, faculty, trustees, alumni, administrators and benefactors—and the various subgroupings within each of those groups, there are literally hundreds of answers to that question. The trick is to decide which of those answers speaks honestly to the needs and interests of the intended audiences. Veteran producer John Browne counsels: "Identify *four or five major themes* that best identify your institution. Those themes are already in existence and only need to be uncovered."

John's choice of verb is significant. "Uncovered" implies discovery, not fabrication. Schools tempted to use a video to answer the question "Who do we want to be?" instead of "Who are we?" are taking a big risk. The school image fabricated by a producer will ring false the moment the viewer steps onto your campus. However, in your impulse toward honesty in media, remember that this is a commercial not a documentary. You are, after all, *selling* your school.

Know Thy Audience

A sense of audience must inform your video. The best way to develop this sense is to think of yourself as a *narrow* caster rather than a broadcaster. You're not CBS or ABC and you *don't want to be*. Your video will *not* appear on millions of TV screens across the nation and although you might not realize it, that's an advantage. Unlike a mass market advertiser, you have the luxury of crafting a message for the sliver of the American public who might be interested in independent education. Remember that less than 1% of the nation's students attend independent schools.

So, don't ape network TV in content. Your message should speak to a different and presumably higher sensibility than most commercial TV programs.

The area where you can take clues from Channel 5 is in production values (camera work, editing, image and sound quality) which must approach those of broadcast TV. Unless it's a home video or their child's school project, viewers are merciless judges of production values. What will sloppy camera work, poor audio or amateurish lighting say about your school? That's why homemade video is such a risk. It's like dressing an outstanding job applicant up in shabby clothes and sending her/him off for an interview. Your school is that person and will be judged by its video clothing.

Here are four ways to enhance audience awareness:

- **Entertain the eye and the ear.** TV viewers have been trained to expect a certain amount of "eye candy" and are consciously or subconsciously disappointed when deprived of it. If a video fails to entertain as it informs, it fails.

- **Use market research** (such as school perception surveys) to target decisive factors in decision making.

Identify the competitive factors in your market. One can't ask a producer to create a school that doesn't exist, but your school is many schools; emphasize the right ones for the marketplace.

The gifted slide-tape producer, Anne Macksoud of Leonardo's Children, Inc., makes this point succinctly: "It is my experience that many, many independent schools are excellent. Your script must show what is different, what is "special" about your school."

• **State your school's strengths as they relate to wider world.** Unlike Peter Prescott's Choate, of the 1960s, boarding schools can no longer be 'a world of our own.' In an increasingly competitive educational marketplace, ivory tower benefits may not justify the hefty tuition investment parents are asked to make. Your video should show how skills and knowledge acquired at your school contribute to your students' happiness and success. However, it's easy to go too far in the success-worshipping mode. Testimonials from Muffy and Biff at Smith and Yale may discourage students of moderate ability as well as parents who see education as something greater than a means of yupward mobility. Don't forget that parents expect independent schools to prepare their kids for life . . . not just intellectually, but morally, emotionally and socially.

• **Understand what video does well and what it does poorly.** Emotion, motion, affect, and mood are where video's power resides. Print is the medium of choice for statistics, listings, and philosophy of education. The numbers of volumes in your library, scope of AP course offerings and campus acreage should be left to your catalog or mentioned by your campus tour-guides.

• **Find a thoughtful producer.** Find someone who knows education, has intellectual curiosity, sensitivity and time. John Browne and Gerret Warner tell us why these qualities are crucial to the success of your video: "Since so much of any production is found art, responsiveness to the material *as it is happening is* a requirement. The best scenes in school videotapes can't be directed by a producer. They simply happen."

Another key qualification is editing ability. There are lots of folks who can take pretty pictures, some who can take arresting, insightful pictures, but few who can bring it all together. Just like Hollywood classics, effective school videos owe as much to the editor as they do to the director and camera operator. Sam Russell, Vice President of Telequest, Inc., describes the effect you seek: "A good production will have a seamless quality; it will draw you in the way a good movie does and you will be unaware of its technical workings. Its message, however, will be clear."

Resist the Purchasing Agent Mentality

Don't let your head, business manager, board chair or other authority figure force you to select a producer principally on the basis of price. Commissioning a video is not like having the school driveway repaved.

It is an artistic *as well as* a commerical decision. Imagine what the Sistine Chapel would have looked like if Pope Sixtus had put it out for bid!

Sam Russell offers this wisdom on establishing a budget: "A good program may be more expensive than one done at bargain prices, but it will return the investment many times over. I suggest suspending judgment on the budget at first. Discover what it is that will fulfill your needs the best. Then tackle the budget. Remember, an ill-conceived production that doesn't work well and that no one wants to use is worth nothing!"

Less is More

You're making a commercial, not a

Video vs Slide/Tape: The Strengths of Each

The Strengths of Slide/Tape

• A 15-minute video might have 40 or 50 different scenes. A comparable slide/tape show can have 500.

• The screen for a slide/tape program is larger than any television screen—it envelops a viewer, overpowering distractions and intruding more forcefully into the imagination.

• Slide/tape shows can be easily transferred onto videotape.

• Slide/tape gains an advantage by its very *inability* to project movement. The series of still images allows the viewer to dwell for a moment. While video takes over the imagination, a slide engages and works with it.

• Slide/tape allows for a mix of sight and sound, allowing multiple images to support a single speech.

The Strengths of Video

• Video's force of illusion is unsurpassed. Its eyes become the viewers, probing and peeping, creating the right setting at the right time.

• Video is attuned to youth; it acts as a stimulant, and promotes excitement and mental activity.

• Video captures the movement of a school—sports, performing arts, mealtimes, work programs—and communicates them in a compelling way.

• Video gains impact and power by combining sight and sound.

• Video can be shipped and shown easily; it gains flexibility in presentation—to one or many.

The Audio-Visual Marketing Handbook is a how-to resource offering specific advice on producing video or slide/tape programs. It features the voices, through articles and interviews, of those most directly involved in the process—audio-visual producers and directors of admission.

And for those who choose to take the plunge, it describes the steps from selecting a producer to employing the final product. In addition, there is an addendum on day school use of AV marketing, a selection of specially commissioned or reprinted articles and a list of AV producers.

A Boarding Schools/NAIS publication by Tom Griffith

1987, paperback, 44 pp. $10. NAIS Order Dept., 18 Tremont Street, Boston, MA 02108

documentary or visual catalog. If you try to jam 3 seasons of sports, all the drama productions, every building on campus and a bit from each academic department plus the new school van, you'll end up with a meaningless soup.

Work Wisely with Your Producer

These guildelines may help:

• **Establish costs, schedule in advance.** Link payment to completion of predefined stages of script/treatment, shooting, rough edit and final edit.

• **Use a committee to gather impressions** but appoint one representative to deal with producer. Three people can't drive a car.

• **Develop a script or treatment.** It allows you to make many mistakes where they are cheapest—on paper.

• **But don't let the script become a straight-jacket.** Visual logic is different from the linear logic of writing; transitions jump out at you in the editing room that weren't apparent on the typewriter.

• **Let your teachers and students speak (or sing or play music) for themselves.** Disembodied baritones and canned music may work for deodorant commercials, but they're often inappropriate for schools. The "narrowcast" audience is able to and prefers to draw its own conclusions.

• **Do use a variety of faces, activities, moods.** Your subject will dictate certain choices here, but don't let it deprive you of people in action and interaction. Don't overpopulate your tape with "talking heads." The begoggled young scientist by a bunsen burner, a trumpeter hitting a high note, your outdoor leadership program kids rappelling out of their 4th floor dorm windows—these are the sorts of scences that involve a viewer.

• **Avoid pious, self-serving generalizations about education.**

• **Be wary of special effects.** Glitzy visuals can misrepresent a school's character. Your head's face spinning into the sky or your dining hall dissolving into a zillion little crystals might not work for prospective parents who are investing $10,000 of hard-earned family funds in their child's future. . . . not 60 cents for a can of "Sprite."

Although rational factors are always part of the equation, the decision to attend a particular independent school is ultimately an emotional one. Veteran admission officers realize that their job is to inspire as much as it is to inform. Since video speaks so directly to emotions, a well-produced tape can be a powerful ally in your struggle to win the hearts of applicants and their families. ■

Chapter 6

Advertising: Another Tool of Promotion

Joel S. Strangis

Before beginning a discussion about advertising, it is important to talk about marketing. Advertising is not marketing. Advertising is a part of promotion and promotion is one part of marketing.

The principal goal of marketing today is to fulfill an existing customer need, a shift from fifty years ago, when the demand for manufactured goods exceeded the supply. In that era, industrialists sought a clever new invention or a better way to produce an existing good. The order was "build it first, sell it second" . . . "build a better mousetrap."

Today, with increased productivity, we have idle production capacity—both human and machine. We are bombarded with goods and services. A successful business today identifies a customer need and then provides a good or a service to meet that need; the customer is king.

The implications of this marketing philosophy are frightening to educators. "You mean we have to let students and parents decide what we teach?" To a certain degree, yes. Sayre School in Lexington, Kentucky, can serve as an example. In the last 25 years Sayre has added courses in Russian; dropped courses in Russian; started football, dropped football; started instruction in computer programming; started a prekindergarten program. Similar examples abound, and usually the shift occurs because people want the course or program and it is financially profitable to offer it.

The Promotion Phase of Marketing

Drawing upon the earlier discussion in this Handbook of the marketing model (see Chapter 1), one is reminded of the "5 P's," product, price, place, promotion and production delivery. The fourth P is promotion, and this is the point: if you don't have a product people want, at a price they are willing to pay, at a place they are willing to get to, you can forget the promotion.

Promotion includes more than advertising. Promotion includes "The Package." How does your campus look? How do people dress? Promotion also includes salesmanship. Who answers the phone inquiries? How long does it take inquiring families to receive materials? Are the materials attractive? And promotion includes advertising—real commercial advertising, sometimes called display advertising. This does not mean a description of your school in the *Porter-Sargent Directory* or *Peterson's Guide*, nor publicizing a fundraising event. "Real" advertising to be most effective in reaching people today matches media, message and target audience. Done right, it really works. In contrast to media publicity, advertising allows the message sender to control the process—you get exactly what you want, where you want, when you want.

Before beginning an advertising program you must answer six questions:

1. **Why advertise? What is your purpose?**
2. **Who is your target audience?**
3. **What is your desired response?**
4. **Which is the most effective media plan?**
5. **What message will you send?**
6. **How will you collect feedback?**

Know What You Want Your Ads to Accomplish

Why advertise in the first place? What is it you hope the ads will accomplish? Reduce attrition, increase enrollment, improve community relations, obtain a higher quality student? All of these are legitimate goals. But are they the right answers to the right question? Often what is identified as a

problem is really only the symptom of a problem. For instance, low enrollment may be the result of viewing a school as too high priced or not worth the money or the lack of visibility—people may not even know the school exists.

An advertising program should be designed to meet a specific problem or promote a specific service. Studying a successful advertising program will often reveal the problem it is designed to address. For example, in the "I love New York" campaign, the problem under attack was the negative attitude, toward New York held by people west of the Hudson River. "I have to go to a meeting in New York next week, but I *hate* New York." In the antidote we see happy people jumping up and down singing "I love New York!"

The best way to get at the problem is through research. This might mean a scientific image survey of 1,000 area families or something less formal and elaborate. At Sayre visits were made to 40 current trustees, former trustees, current parents, former parents and alumni. These people were asked what they thought about the school—its strengths, its weaknesses, why their children attended, or did not attend. Three problems emerged from this study.

First, the school had gone through a difficult period five to ten years before. However, people still held an impression of the school based on that period. Second, current parents were not clear why they enrolled at Sayre. And third, Lexington residents tend to be complacent about their schools. The Lexington schools are among the best in a state that has one of the worst education systems in the nation. Lexington schools look very good to someone who grew up in rural Kentucky 20 years ago. The school undertook to develop an advertising plan that would combat these negative or indifferent attitudes, first by presenting an accurate, current view of the school stressing academic quality. In addition, ads were aimed at giving Sayre parents some "cocktail party ammunition," an answer to the question "Why do your children attend Sayre?" Finally, Sayre wanted to focus public opinion as to what constitutes a "good school" without actually criticizing the public schools. This was the answer to "why advertise?"

Sayre presented a series of ads entitled "Parents Ask Us" to gain greater visibility in the community. Written by faculty members, these editorial-style ads answer questions that arise in the relationship between families and school:

- **How can my child choose the right college?**
- **How can I get my teenager to read?**
- **How can I help my child succeed in school?**
- **Should I help my child with homework?**
- **Should I buy a home computer for my child?**
- **Should my child attend preschool?**
- **At what age should children start studying foreign languages?**

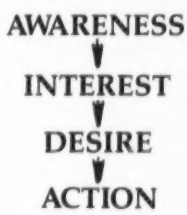
Know your target market

What audience are you trying to reach? Sayre aimed its ads primarily at middle class and upper middle class parents of students ages 3 to 16 years living in the greater Lexington area. Another school's target audience may be different. A boarding school may want to reach students ages 12 to 14 years and their parents in a four-state area. Or a school may be trying to reach minority students. Decisions as to the profile of the market will influence the selection of both medium and message. Consider, for instance, that a school is confronted with a "troika decision process" in which mom, dad and junior each have a veto. An effective approach may involve one type of message and medium for mom and dad and another message and medium for junior.

What Response Do You Hope to Elicit?

The component in creating an effective ad campaign is knowing what you want the target audience to do. Ultimately you want your target audience to "buy the product," for instance, enroll a child or send money. In the short run, the best you probably can hope for is a call or mail back for more information. It is unrealistic to expect an ad in the morning paper to result in a tuition check. An ad might make a person aware of your school, it might even evoke interest in your school. But most likely it will not produce a completed application.

Advertisers pay close attention to what is called a *response hierarchy*—the stages a person must go through before he or she will take action. One such model recognizes four steps:



A person has to be aware of your school, take interest in what you do and desire the benefits of your product before he or she will take action. A toothpaste commercial might ask, "Buy some today!" "Get some soon!" That's not a very big commitment. On your next trip to the drugstore, you can spend 99¢ to try some.

A car dealer knows that an ad will not convince a person to buy a car. "Visit our showroom," and we'll answer your questions and convince you our deal fits your needs. The ad's only purpose is to get the prospective customer into the showroom with a positive attitude. Advertising can stimulate awareness and perhaps even stir up some interest, but at this stage other factors are more influential in moving a person closer to the ultimate commitment, such as the opinion of friends or authority

figures and alleviating concerns through information gathering.

When Sayre started advertising, every caller was asked, "How did you hear about the school?" The most frequent response was, "I've always known about the school, but I saw your ad in the paper today and decided to call." The callers were aware. The ad provoked interest, desire and an action. This is a spiral process; awareness produces interest, which produces a certain amount of desire, which produces an action. That action (such as calling for a brochure) restarts the process with a new level of awareness interest—desire—action. The next action may be visiting the campus, thus leading to a new level of awareness—interest—desire—action (sending in an application).

Advertising—How Often and When?

The guiding principle in the inevitable compromise between spending too much and spending too little on advertising is frequency. One ad does not do it. Advertisers calculate that a person must see an ad two and a half to three times in order for it to sink in. Suppose the average person in your adult audience reads about half of the morning paper four out of five weekdays not remembering which half. To be reasonably sure your ad was seen you may have to run it five to ten times. The same holds true for TV and radio.

Advertising should tell your audience about something they want, when they want it. The best time to advertise is when your target group is making decisions about schools. A year of advertising might follow this timetable:

October–December
This is a prime time for boarding schools to obtain names for area receptions and for day schools to attract and retain students in grades 8–10.

January–March
Parents are thinking ahead to where a young child will be attending prekindergarten, kindergarten or first grade. Advertising can focus on this decision.

April–May
During this time, mom and dad may have grown weary of "P.S. 49" especially grades 2–8. Likewise, parents are deciding if their child will be returning to your school. Ads to reinforce reasons for staying meet the needs of this season.

June–July
Not much goes on this time of year in terms of the advertising cycle. (Go on vacation, write next year's brochure.)

August
All hell breaks loose! New families move to town. People finally face the reality of P.S. 49. All those families who paid a $200 or $300 deposit are now deciding whether they really want to pay the remaining $4,000 or so for an education at your school. What ads will augment the other promotion activities that go on this season?

Budgetary restrictions also mandate a careful look at the timing of competing advertising that may obscure your message. August/September is back to school sales time; October/November political campaigns; November/December, Christmas. January/February is slow time for ads and often a good time of year to strike a bargain with media, such as "buy one ad; get one free."

Holland Hall (OK) placed an ad for $300 to boost media recognition of the school's US Department of Education award as one of 60 outstanding elementary schools in the nation.

Advertising—Picking the Medium

Where to advertise depends on your target market. These are the major media choices:

Television
Television advertising is beyond the reach of most independent school budgets. Buying time is not the only expense. TV spots must be highly produced, using professional photography and direction. If you wish to pursue visibility through this medium, it may be best to do so through publicity rather than advertising.

Radio
You probably can get production donated, if you stay on one station. Sayre surveyed parents and asked "what radio station do you listen to the most minutes per day?" There were a dozen different answers. In order to reach 50% of the parents Sayre would have to be on four different stations. The highest score for any station was 22%. With students however, it's a different story. 55% of Sayre students in grades 7–11 listen to one station, which would be the likely place for reaching Sayre students and students like them.

Newspaper
Newspaper is an effective medium for independent schools. (Ads can be clipped and saved to show a spouse when he/she gets home from work.) The kind of parents independent schools are looking for are parents who read. In surveying current parents Sayre learned that 80% subscribe to the *Lexington Herald-Leader*. Two-thirds say they read it every day. Sayre avoids advertising on Wednesday (to avoid being obscured by food ads). On Saturday and Sunday there is no one at school to answer a phone call, if the people call. In many ways, Tuesday is the best day of the week to run an ad.

Magazines
Regional magazines, the regional issues of national magazines such as *Time*, *Newsweek* and *Sports Illustrated*, airline magazines and religious magazines all offer opportunities for reaching your target audience through advertising. Simi-

Collaborative advertising through Boarding Schools benefits 240 member schools. This ad alone, appeared in three issues of *Independent School* magazine (circulation 8,900 @ issue); *Boarding Schools Directory* (circulation 53,000); Boarding Schools poster (circulation 72,000). Boarding Schools creates its own vehicles for advertising and employs them in a targeted direct mail program.

Step Inside the Boarding School Experience.
What's it like to live where you learn? Find out by ordering a copy of the video that puts you inside the shoes of today's boarding school students. You'll follow their footsteps into dormitories, dining halls, studios, theatres, playing fields, swimming pools, stables and libraries. You'll also tag along on some off-campus adventures in rockclimbing and kayaking.
But your most important steps will be those that carry you inside boarding school classrooms from Switzerland to California. There you'll meet unforgettable teachers whose love of their craft and their students stands at the very core of the boarding school experience.
Guidance counselors, librarians, youth workers, and media specialists* can now help students try boarding school on for size... for less than the cost of a pair of sneakers.
Boarding Schools: The Video
15 minutes VHS cassette $9.95 + $2.00 shipping
*Schools, libraries, corporations, embassies, and youth organizations may order via mail or telephone with a purchase order.
Boarding Schools
18 Tremont St.
Boston, MA 02108
(617) 723-6900

larly, independent schools have had good success placing ads in specialty publications, such as symphony play bills, service organization yearbooks, and so forth. It is important to tie the ad copy into the theme or nature of the publication for best results.

What Will You Say?

Deciding why you are advertising, picking your target market, establishing the desired response and deciding when and where the message will appear provides excellent guidance in determining the message. But, this is the moment at which the science of advertising becomes the art of advertising.

The message must address the problem. Sayre School is a college prep school in Kentucky, the state with the lowest percentage of adult high school graduates in the country. Many Kentuckians don't know how good a school can be, and so Sayre adopted this as an advertising theme. **COME AND SEE HOW GOOD A SCHOOL CAN BE.** Also Sayre was trying to build the market for independent schools—there is only one other in a 20-county area. Marketing directors knew Sayre would be likely to get at least half of any increase in independent school enrollment.

When setting up an ad, make sure to graphically and editorially emphasize *quality* and make sure the ad is a positive, accurate representative of your school. Someone from inside the institution should write the copy; no one from the outside can know the school as you do. Consider running a series and using testimonials by parents or students, reserving the right to edit. Never promise to print verbatim whatever a person says or writes.

Finally, sell the benefit, not the feature. This is sometimes called "sell the sizzle not the steak." Don't present lists of features at your school. Tell parents why their child will be happier and more successful at your school. "We have one teacher for every ten students"—that is a feature. "Our teachers have the time to answer your child's questions"—that is a benefit.

Did It Work?

How will you know if your ad campaign worked? Counting mail-in coupons or telephone calls is one way. But against what measurements are you going to compare this response? It is necessary to track inquiries both during the time ads are running and when they are not. So start now, as Sayre School did, counting inquiries before running the first ads. In the three weeks before running the ads in 1982, they averaged seven inquiries per week. During the seven weeks the ads were running, the school averaged 13.85 inquiries per week, almost double the expected number. One out of every four people who called for information eventually enrolled at the school, yielding twelve more students than the previous year.

Ads for Current families, Too

Who reads ads? During the 1960s

a hot marketing topic concerned "cognitive dissonance," referring to the attempt made by individuals who had made a large purchase to select information that reinforces that decision. For instance, surveys found the person most likely to read a Chevrolet ad was someone who had just bought a Chevrolet. We decided to test this concept with parents.

Sayre surveyed three groups: A random sample of parents who had re-enrolled a child for the fall; all new families who had sent in their deposit; and families living in the same neighborhood as the newly enrolled group with school age children attending schools other than Sayre. Three groups: returning families; new families; and neighbors of new families. The survey was designed to look as though it came from an outside group.

Sayre asked each group: "Do you recall seeing or hearing an ad for Sayre School in the last two years?" The answers were as follows: 48% of the neighbors indicated they had seen or heard a Sayre ad, 68% of the new families had seen or heard a Sayre ad, 89% of the reenrolling families had seen or heard a Sayre ad. (Difference is significant on a chi square test at better than .01%.)

The survey was conducted in late August and early September and, since the school had run two newspaper ads in August, the survey also asked: "Do you recall seeing or hearing an advertisement for Sayre School since August 1?" After eliminating families who were out of town during the ad period, or who were not regular newspaper readers, the school received the following responses:

Readership	Reenroll Families	New Families	Neighbors
Saw ad	54.8%	55.6%	34.2%
Did not see ad	45.2%	44.4%	65.8%
	100.0%	100.0%	100.0%
N=	42	54	38

While most of the new families and reenrolling families reported seeing an ad, only about a third of their neighbors recalled seeing one of the two ads. In fact, the response of the reenrolling families and the new families was almost identical. Furthermore the school analyzed the degree to which parents had read the ads by asking them to recall all or part of an ad. The results were as follows:

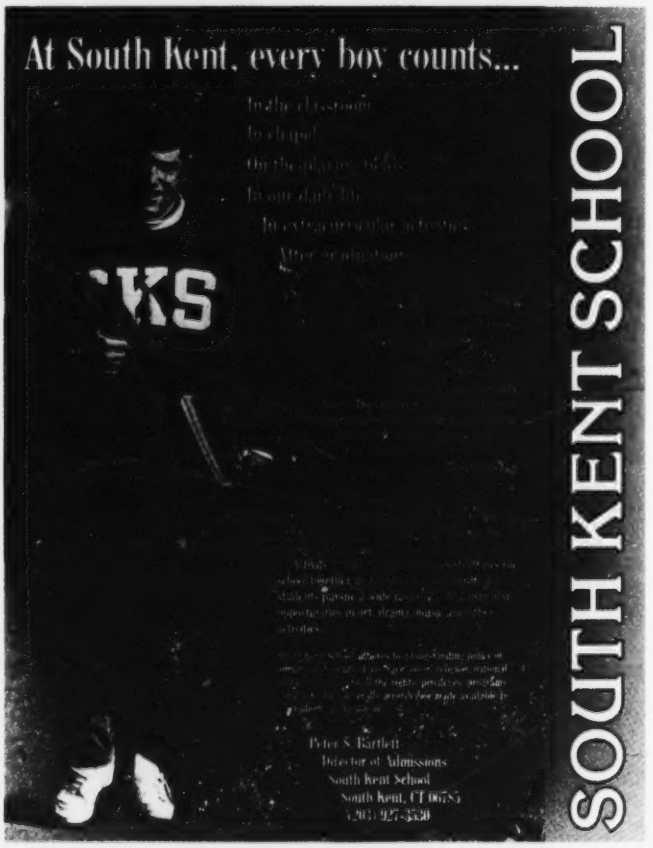
Readership	Reenroll Families	New Families	Neighbors
Saw ad, specific recall	23.8%	31.5%	18.4%
Saw ad, no specifics	31.0%	24.1%	15.8%
Did not see ad	45.2%	44.4%	65.8%
	100.0%	100.0%	100.0%
N=	42	54	38

While the reenrolling families were less likely to recall a specific part of the ad than were the new families, the positive responses from both groups are encouraging, given that only two ads were run at a modest cost of $175 each.

Advertising is a good method for communicating with prospective families; keep in mind however that it is also an excellent method for communicating with current families.

The Sayre School Case Study

Sayre began its ad program in April 1982, committing to seven newspaper ads. The director of admissions wrote the copy for six of the ads, two seniors wrote the copy for the seventh ad. The school hired a professional ad agency to design and typeset the ads. Sayre paid regular rates for production and



South Kent (CT), an Episcopal school, targets publications in which to advertise that are likely to be read by "sympathetic" audiences. This full-page ad will appear in the directory of the National Association of Episcopal Schools. A series of small ads runs in The Episcopalian, *a monthly newspaper with a circulation over 230,000.*

newspaper space; the ad agency waived the standard 15% agency commission as a favor.

Each ad had a different theme. The first ad, "A part of Lexington since 1854," told about the school's role in the community: "We're as old as our antebellum administration building and as new as our Apple computers." One ad focused on the sports program, "Yes we have no football." In one ad the school saluted its teachers by listing all their names.

Each ad was built around the theme "Come and see how good a school can be." Sayre doubled the number of inquiries per day during the period of the ads and also increased the deposit rate for the fall among current students.

The school discovered multiple uses for the display ads, reprinting one in the quarterly newsletter. Sayre reprinted another ad on the back of the program for the spring auction and produced 1,600 self-mailing reprints of the entire series. About 400 of the reprints were bulk mailed to current families, while 200 reprints were mailed to prospective families. Then the school selected three "upscale neighborhoods" with many families including school age children. We mailed to every household in those neighborhoods by "carrier route sort." That amounted to another 900 to 1,000 reprints.

The cost for the 1982 program was $3,013, excluding staff time. The cost for 1983, excluding staff time, was $3,006.

While the response from new families was impressive, the response from currently enrolled families was unbelievable. Enthusiasm for the school was expressed on all levels. Even faculty members learned things they had never known about the school.

In 1983, Sayre felt it had "staked out our territory" and wanted to do something a little more soft sell. The school decided to do a series that would be seen as a community service thereby establishing Sayre School as Lexington's "Flagship educational institution." Such stature in the community would be helpful in preparing for a capital campaign.

Sayre came up with the "Parents Ask Us" theme for five ads on topics of interest to the parents of school-age children. The ads ran simultaneously on radio (two a day for six weeks) and in the newspaper (one a week for five weeks).

The radio station did the production for free and gave Sayre a "deal" on the purchase of air time. The ads featured a parent with a nice voice doing an introduction, a secretary (who has four children at the school) asking the question and the teacher "expert" reading his or her own copy, which had been edited carefully. Approximately the same copy ran in the newspaper. What happened? In 1981, there were about 105 new students. In 1982, the fall after Sayre began advertising, there were 117 new students. In 1983, after two years of ads, there were 161 new students. By 1984 the school had moved from average annual enrollment of 450–460 students to enrollment of 570 students.

Budget

How much should a school spend on advertising? Budget was not listed above as one of the six questions to pose before beginning the ad program, because it is from the answers to these questions that the budget will derive. Decide first what it is you want to do. Then decide what it will cost. You may have to make some compromises between your most ambitious program and what you can afford. But the worst thing you can do is to design a program to meet a hypothetical budget.

In order to provide a suggested rough guideline, you might aim to spend one to two times an individual student's total tuition and fees. For most day schools this ranges from $5,000 to $10,000 on an annual basis for "real" advertising (not including directory listings). For most boarding schools the annual budget would be between $10,000 and $20,000.

Be careful of donated services—either production or media space. Remember you are advertising so you can control the what, when and where. If a newspaper gives you free advertising space, but you surrender control of the when and where, is it worth it? If a graphic artist volunteers to produce the ad, but then entirely misses the point of your campaign, is that worth the "savings"?

Do not overestimate the results ad cans achieve. Remember the example of the toothpaste and the cars. People will buy toothpaste because they saw an ad. People will not buy a high ticket item, a car or an education, because they saw an ad. Sayre School would have difficulty identifying a specific student who enrolled because of an advertisement. But it is possible to report that in three years enrollment increased 25%. Retention increased 5% and income for current operations increased 60%. The ad only starts the awareness-interest-desire-action spiral. Advertising is only one part of a marketing program.■

Chapter 7

Putting Publicity to Work for Your School

Selby Holmberg

In considering the various tools of communication available for the promotion phase of marketing, publicity may seem the most elusive and least well understood. On the one hand, publicity is "free" and can expose a school to a wide—even nationwide—readership or viewership. On the other hand, a school is not in control of the message being conveyed by print or electronic media, the timing of the message or the make-up of the audience receiving the message. Further, once media coverage is obtained, it is difficult to quantify its benefits in student applications or fund-raising dollars.

Still, independent schools that have in the past been "media-phobic," preferring to be ignored rather than noticed by the media, are discovering that positive publicity can be an important support tool in the school's whole marketing effort. Good packaging and presentation of a feature story on an unusual course or an innovative theater production may inspire a reporter hungry for some colorful education news to tell a positive story about a school. The resulting objective report by an "outsider" serves as a powerful reinforcement of the school's message, already beautifully stated in well crafted recruitment materials. And on the other side of the coin, when the school's news is bad, its management is easier when a school has an established relationship with its local media representatives.

At this point, however, most schools willing to invest in a publications program that will support the admission effort are less likely to commit precious resources to a publicity program. Media relations are then left for a very busy publications or development director to fit into his or her already tight schedule. With the tools outlined in this chapter, beginning with a good media mailing list and the cooperation of colleagues in the classroom and on the playing fields who can call attention to good story material, that busy person can develop positive publicity in concert with other tasks at hand.

Learning what news sells and becoming familiar with how the news industry operates can open up a new horizon for independent schools. Schools must come to see that they are information resources for the media and they must then convince the media that the door is open.

After all the other hard work involved in a marketing effort is completed, good publicity in effect puts the icing on the cake. Newspaper articles, radio or television stories carry with them a special authority that can give credibility to the school's programs because they represent the views of journalists as outside opinion makers. Further, positive publicity reinforces the good will of the school's internal audiences—students and their families, alumni/ae, trustees, faculty and staff, donors and current friends, all of whom are very important to a school's public relations effort—and introduces the school to new audiences—prospective students, families, donors, the community at large and the general public.

But good publicity doesn't just happen. Schools need to package good news and manage bad news. Both can be accomplished with an understanding of the media and a few basic tools of the trade.

First, some words of encouragement: everyone is, in one way or another, interested in education. Thus, while education stories are not normally considered to be "hard news," they are of interest to the media. To that end, most daily newspapers and even some weekly newspapers have reporters and editors assigned to the education newsbeat. Independent school professionals can be an important source of information about education for those journalists. They

represent not only a school but an industry—independent schools—and a perspective that can only add to any story about precollegiate education in general.

It is crucial in developing relationships with the local media that a publicist presents him- or herself as a helpful resource. That means one should get to know colleagues in other area schools, including public schools, and work cooperatively when that will help a reporter's story. That reporter will come back again and again for stories.

The Personal Touch

There is no substitute for personal contact. Knowing the people who will be writing about a school is the single most important step toward gaining publicity. Publicists should invite reporters to visit the school and pay a short, introductory visit to their places of work to drop off a press kit. The publicist can get to know reporters over the phone, offering to be helpful and let them know if something important happens at the school and asking what their readers or viewers would like to know about independent schools.

Publicists must remain friendly through thick and thin; a positive attitude will pay off. However, remember, no matter how friendly the relationship becomes, reporters do not keep secrets. Journalists are in the business of seeking the truth, and that is what they will report. Publicists and other school spokespersons should always speak "on the record."

The Tools of Publicity

The Media List

A publicist's most valuable tool is a media list, and indeed the first job that one must undertake in setting up a PR office is to create such as list. A number of good national media directories are available at libraries, and often local media directories exist for large metropolitan areas. Area college public relations offices can provide some guidance on local media listings and are usually happy to help school publicists. Over time, publicists will develop several lists: • a "call list" of the school's most valued media contacts who should be called with breaking news • a list of calendar editors • a talk show producer's list • a list of public affairs directors • (most important) the full mailing list of all news and feature outlets which include education reporters and editors, city editors, weekly editors and reporters, TV and radio news assignment editors, local wire service bureaus, network TV bureaus, and regional or specialty publications. Local company and real estate industry newsletters might also be a good resource for positioning school news. These lists should be updated regularly with new contacts and personnel changes (which are frequent in the news business).

School Press Kits: What They Should Contain

Use durable folders with side pockets

Affix your card with name and telephone number to one of the inside pockets

Organize and display your materials in the inside pockets, such as:

- **School catalog and brochures**
- **Promotional material**
- **History of the school**
- **Statement of philosophy, purpose**
- **Fact sheet on the school**
- **Parents/alumni newsletter and magazine**
- **Short biography of the school head**
- **Student newspaper and literary magazine**
- **School calendar**
- **Notices of speakers and school events**
- **Sports activities information**
- **Notices of extracurricular activities**
- **Profile of student body**
- **College acceptance record**
- **Press releases**
- **Reprints of articles published about school**
- **Reprints of articles about people at the school**
- **Profile of faculty**
- **Suggestions for story ideas/lead sheet**

Update your press kits from time to time, and err on the side of including too much material rather than too little.

The Press Kit

The publicist should prepare a basic press kit with background information on the school to use whenever meeting with or writing to a journalist. Customarily, journalists file this information to draw on later when writing about education in general or a particular school. When a newsworthy event occurs, the publicist can add information about it to the basic press kit to present to the press.

The Press Release

The press release is still the basic means of communication with the press. Its purpose is twofold: to alert the press to an important event, trend or story (and persuade them to write about it) and to provide ready-made material for publication. Many smaller newspapers publish press releases verbatim. Certain journalistic conventions should be observed in preparing press releases.

The Press Advisory and Lead Sheet

Other means of communicating newsworthy information to the press are through press advisories and lead sheets. The former is an invitation to the press to cover an upcoming event such as a major speaker on campus, an open house or other special event. The advisory contains information about the event, its purpose, importance, whereabouts, date, time and participants.

The lead sheet is a list, usually one page only, of story ideas emanating from the school. The publicist can list several story suggestions—one sentence each—and invite journalists to call for more information. Lead sheets are particularly useful during the summer when newspapers are preparing back-to-school articles. Journalists sometimes gratefully follow up on ideas presented to them this way. The school name, address, telephone number and the publicist's name should appear at

the top of the page, as with a press release.

The Press Conference

Press conferences should be called *only* when there are multiple inquiries from the press (as in a crisis) and the news is best managed in one presentation to a group, or when a very newsworthy person (such as a presidential candidate) is on campus and several local media may be interested in conducting interviews.

If a press conference seems to be in order, good planning will help things go smoothly. The publicist should:

- Invite all local and other media with a written advisory followed by a phone call
- Arrange to hold the press conference in the school or elsewhere in a large enough room with ample electrical outlets and power (for radio and television equipment) as well as ample seating
- Prepare press kits and fact sheets with specific information about the announcement to be made, including key people involved
- Have coffee and a snack available as a courtesy to reporters and technical crews
- Help prepare an articulate, high-ranking spokesperson to make brief remarks about the event, its significance and the school's position with respect to it
- Allow for a question and answer period, introducing other experts to answer questions at this time, if appropriate
- Maintain a press sign-in sheet so there will be a record of who attended
- Hire a clipping service or track the media afterward to monitor the resulting publicity
- Evaluate the handling of the press conference, making notes on what to do next time.

Crisis Plan for Good Media Relations

1. **Be prepared to work fast!**
2. **Gather the facts. Working with key people (head, trustees, lawyer) quickly assess what is known about the crisis and what the school's legal responsibilities are in regard to releasing information about minor students.**
3. **Name *one* spokesperson for the school—preferably the head, board chair or public relations person. That person will handle *all* communications with the media.**
4. **Inform switchboard personnel who that person will be. Until you are ready, instruct switchboard personnel to take names and phone numbers of reporters, plus the news medium they represent, and assure callers that the spokesperson (named) will return their call within a specified amount of time.**
5. **Develop handout material:**
   a) A chronology or fact sheet listing what is known about the crisis.
   b) A statement of the school's official policy and sanctions with regard to the issue under discussion.
   c) Some general background information about the school.
6. **Let internal publics (students, faculty, staff) know what is happening with respect to the incident and media interest. Let them know who the spokesperson is and ask them to refer all questions to that person.**
7. **When you are ready, return calls promptly and honor deadlines.**
8. **Communicate that you want to be helpful to media—avoid hostility. If you don't know how to respond to a question, say so, and say that you will research the issue and get back to them.**
9. **Call a press conference, if necessary, to manage a large number of reporters. Choose a good room to stage a conference, with adequate seating and electrical outlets. This will also give you opportunity to defer questions until you are ready to answer them.**
10. **Have no conversation "off the record."**
11. **Do not attempt to deny the problem. Recognize it, placed in the context of the larger society. Emphasize the school's policy (forethought on the issue) and its quick and decisive action.**
12. **Be truthful.**

Gaining Publicity through the Print Media

The publicist considers what kind of information is being made available to determine an appropriate placement in the print media. Events might be announced in the calendar section, promotions and honors in the "people" section, new building plans or development campaigns in the metro section of a daily newspaper or in the news section of a weekly newspaper, unusual programs or human interest stories in the feature section. Photographs are a very effective publicity tool. A newspaper that is not likely to print a news story about a school's event after the fact may still use a photo with a carefully written caption to tell the story. Similarly, photographs help to ensure the placement of "people" news.

The news wire services are also

an important avenue into print and can often yield multiple exposures for a story in newspapers regionally and nationally. Publicists should maintain good contacts with local AP and UPI bureaus, who will consider both news and feature stories if they are interesting enough.

News Stories

Independent schools generally find themselves in the news section of daily papers as part of an education "trend" story or in response to "bad news," such as a fire or other campus tragedy. In those cases, it is the function of the PR officer to make sure the newspaper has gained access quickly to the correct information in order to meet news deadlines.

Occasionally independent schools are conducting programs or activities that have a "newspeg" or relationship to newsmaking events in the larger community or nation. PR officers need to be able to recognize and use these opportunities as they arise. For example, Phillips Academy (MA) received national news coverage for its exchange of students (the first ever) with a Soviet high school. The story was first released in the aftermath of the Soviet/American summit in Reykyavik in the *New York Times* as part of a larger story on U.S. State Department initiatives with the Soviet Union. It then was extensively followed, through judicious cultivation by the school's public relations office, in the regional press. When Andover students returned from their stay at the Soviet school, they were greeted at the airport by a small army of reporters and photographers who had been notified by the school. A very positive story appeared in the next morning's *Boston Globe* among other media outlets.

Similarly, while divestment debates were making national news, Northfield Mount Hermon School (MA) enjoyed regional coverage of its scholarship program for South African students. PR Director Kim Nilsen reports that he has cultivated good relationships with regional representatives of national media—local wire service offices, local network television affiliates—and then solicited their help in finding national markets for NMH stories. He supports those efforts by sending along press kits with background material and some press clips showing local coverage. Further, he follows up with phone calls.

Holland Hall School (OK) was able to generate three local news stories in the *Tulsa World* through one event—the school's consideration for the U.S. Department of Education's Elementary School Recognition Program. All three stories were placed through press releases from the school. The first story announced that Holland Hall was a finalist in the selection process, the second, that Holland Hall, along with a local public school, had been selected as an exemplary elementary school and the third, that school officials would be attending a ceremony honoring the school in Washington.

Feature Stories

Independent schools most often find their best coverage, however, in, "soft" feature stories in which a reporter has taken the time to really get to know a school and to interview some of its key spokespeople.

Features generally focus on stories with a happy outcome, with a personal human interest angle

Students say it's worth it

Private school: It's hard work

SUNRIVER – There are no bells, demerits or tardy slips at Sunriver Preparatory School, and students' lockers have no locks.

But five hours a night of homework is the norm, at least in the upper grade levels, and some of the 150 students who remember life at public schools say the academics are a tough grind, but worth it.

When he attended public school in Klamath Falls, Jock Marx never had to work very hard. Often he would finish his homework at lunchtime or work on it in front of the television and still maintain a 3.9 grade-point average.

"Here it's even hard to listen to the radio (while doing homework)," said the 16-year-old junior, who is in his second year at Sunriver.

The expectations at the school are higher as well, he said, and the instructors expect students to go to college. At public schools, he felt teachers didn't really care if he continued his education.

And because the teacher-to-student ratio is higher at Sunriver, teachers can spend more time with their students, he said, adding they show him the rewards of hard work by bringing in representatives of colleges and judges for science projects.

"They give you goals to work for," he explained. "In public school, you just do it for the grade."

Grades also get different treatment at Sunriver, said Kristie Dieckman of Bend, a recent transfer from Mountain View High School. Dieckman, 15 and a sophomore, said students get an A through F letter grade with a 1 through 5 number rating attached to it.

The number is for "distinction" and is made up of a student's effort, homework and behavior. Thus a C-5 grade is an indication a student is working as hard as he or she can, she explained.

Dieckman said she transferred to Sunriver for the academics, which she admits are much harder than at Mountain View, and to do something different.

"I wanted to get out of the crowd and be my own person," she said, adding that the close atmosphere at the school means "you can't sit in the back of the classroom and hide."

Elizabeth Redding

Sarah Schneider

Jock Marx

It also means "round-table" discussions take precedence over desks, counselors seek out students to see how they're doing instead of students initiating contact and "if I go up to somebody and give them a hug, nobody thinks I'm weird," Dieckman said.

The close atmosphere and small classes also appeal to freshman Kevin Mitchell, who moved to Sunriver three years ago from Portland. Mitchell said there were 40 students in his public school class, but when he started at Sunriver Prep, there were only six others in his class.

That means "the teachers talk to you more," Mitchell said, and there's an atmosphere of trust that makes it not "feel" like a school.

Mitchell confessed his parents at first enrolled him at Sunriver as a sort of reform school "for my own good." In public school, he had flunked two classes simply because he didn't care. Now, his grades have improved and he has the chance to get into a good college. Given the choice to return to a public school, he said recently he would want to stay put, even though the academics are difficult.

"It's totally more intellectual and complex," he said, adding that there is little tardiness or absence. "Nobody skips a class here."

Mitchell also likes the lack of differentiation between classes, which means even as a freshman, he can have friends who are seniors, and Elizabeth Redding, who also went to public school in Portland, agreed.

A 16-year-old junior in her first year at Sunriver, Redding said for the first month or two, she didn't know what grade students were in. And it didn't matter, she added, to the general agreement of the others.

Redding, who lives in Sunriver, also said the work in public school was so easy and unchallenging that nobody tried.

"Here, the teachers recognize how hard you try," she said.

Another significant change she appreciated was a social atmosphere that stressed the camaraderie of school outings, such as field trips and mountain hikes, rather than the typical "party atmosphere" of a public high school.

Besides being more academically ready for college, people are more mentally ready," she said.

That mental readiness comes with the maturity that is created when students are treated as adults and develop a sense of individuality and personal responsibility, said freshman Sarah Schneider, 14, who is attending Sunriver Prep for the third year.

One of the biggest misconceptions about private schools, especially this one, is that we're really rigid," she said, debunking the myth as simply untrue.

On the contrary, she said, the school is very flexible and has few rules. Students are free to act and dress as individuals, encouraged to ask questions and challenged at every step — whether the class they happen to be sitting in is science or art.

The attitude toward learning is quite different from what she remembers of public school, the last she attended being Cascade Junior High in Bend.

"Public schools take you by the hand and lead you," she said. "Here you take yourself."

—Theo Rhiannon

A booster for Sunriver Preparatory School (OR) specifically and independent education generally, this feature excerpts interviews with students on their experience in private school.

BEST COPY AVAILABLE

and on interesting, original, out-of-the-ordinary happenings. Here is where independent schools excel. Schools will find it well worth their while to suggest story ideas to feature editors, such as an innovative program or an interesting personality on campus.

A key to identifying good feature ideas is to think of stories that attract your attention in the newspaper. A recent story about Mary Institute in St. Louis, MO, focused on its commitment to educating girls in the era of coeducation. The story led off with a paragraph on the school's annual budget and found placement in the local weekly business journal. An announcement that the head of Elliott-Pope School (CA) would take a sabbatical led to a feature story in a Riverside daily newspaper about the school's successes during the head's tenure. A Bend, OR, daily paper interviewed students at Sunriver Preparatory School for a positive story on working hard and loving it at a private school.

Some newspapers and many magazines accept feature stories from free-lance writers. Others assign staff writers to prepare articles. The publicist should find out the modus operandi of the periodicals and newspapers the school plans to approach. The publicist can offer to write the article or ask if the editor would like to assign a staff reporter or a professional free-lance writer to the article.

Special Sections and Special Interest Journals

It is helpful to inquire periodically whether general interest newspapers and magazines are planning special supplements. If so, they can be approached with plenty of lead time with relevant story ideas. An upcoming sports special, for instance, may lend itself to a story on a school-based teacher training program or a camping section to an article on an all-school wilderness trek. Imagination, resourceful thinking and simply keeping in touch with news media really pay off. Special interest magazines are fertile ground for the same sort of story ideas. It is important to remember, however, that these publications sometimes need to be approached months in advance of the publication date.

Editorial and Commentary Columns

Editorial writers and columnists welcome hearing from their readers. When an educational or public policy issue arises that editors or columnists might comment on, the publicist should call them up or drop a note to plant a seed, explaining why the issue is important and what the school's opinion is on the subject. In so doing, the publicist may help persuade the writer to adopt a position favorable to independent education or to his or her school or simply to call public attention to an important issue that might otherwise go overlooked.

Op-ed and Letters to the Editor

Op-ed, literally meaning opposite to the editorial page, offers an excellent opportunity for exposure. Here, short articles often written by members of the outside community express viewpoints on important issues. Publicists should study the length and type of subject matter covered by op-ed pieces in their newspapers.

The op-ed editor can be contacted about topics of interest to the newspaper. If the publicist gets a green light, he or she should write the piece to the appropriate length and send it, along with a cover letter, directly to the op-ed editor. The newspaper reserves the right not to publish it, but enough schools have met with success often enough to make their efforts worthwhile. A program in which members of the faculty, administrators, parents, students and trustees take turns writing occasional op-ed pieces on timely subjects can keep a school's name and position before the public.

Letters to the editor are one of the more heavily read parts of the newspaper, with a minimum of one in four readers turning attention to this section. Encouraging members of the school community to write carefully crafted letters to the editor will increase the number of times the school is represented in print.

Calendar Sections

Special events to which the outside community is invited as well as admission test dates should be listed in the calendar section of newspapers and the local city magazines throughout the academic year. These listings should be brief (one or two sentences) and include date, time, location, cost and a brief description of the event. The lead time required for such announcements is sometimes surprisingly long, and the publicist should know the deadline and the form in which the editor needs the information.

Hometown Newspapers

The importance of local, suburban or weekly newspapers should not be underestimated. They welcome material on the doings of people who live within their distribution areas. When a student receives a particular honor; a teacher, a prize; a trustee, a role in a major conference—sending a press release to the local newspaper in the person's home town may result in a nice article. Most schools have scores of opportunities for this type of publicity.

Schools that draw students from several communities will want to have access to several local weekly papers. It is important to help those papers understand why they should print the school's news. For instance, Wheeler School (RI) establishes the school's connection with surrounding communities by listing the total number of students from each local community at the bottom of a press release about enrollments or a graduating class.

Gaining Publicity through Radio and Television

News

Radio and television news stories average no more than 50 words per story and do not allow the exploration of a subject in any depth. As a

result, education stories which require some thoughtful treatment fare less well on TV and radio news programs than they do in print. Television feature programs such as "Evening Magazine," and radio feature programs such as NPR's "All Things Considered" offer better opportunities for good coverage. Producers of these programs are looking for stories with strong content that can be kept "in the can" and aired at the station's convenience. Time-dated stories cannot be covered in feature programs.

Again, the stories that have the most positive impact for independent schools on television news programs are short features with exciting visual content. The Watkinson School (CT), for example, as part of its centennial arranged for the school head to arrive at an outdoor school gathering in a colorful hot air balloon. The media were notified in advance, and the television crews came out in force, giving excellent coverage on the evening news.

Northfield Mount Hermon (MA) also has had success in attracting television coverage of events. Recently TV reporters covered the school's Bemis-Forslund Pie Race—a foot race in which the winners are rewarded with home-baked pies. The story was carried on the local television station and fed to CNN News, where it aired several times in one day. Both of the above stories offered TV news editors good visual possibilities.

Radio features are most attractive to news editors when they offer "good sound." Radio reporters may respond to an invitation to cover a story by recording an "actuality" in which the spokesperson is asked to explain the story concisely on tape. The reporter may arrange to come to the school to interview people and pick up background sound that will give the story color. Radio stations covering speeches or other events at the school will bring their own microphones and taping equipment but need to be provided with extension cords and other technical assistance in setting their equipment up.

Publicists with technical skills and access to good equipment can videotape or audiotape their own events, edit the story to no more than one minute in length and offer it to local electronic outlets in time for the six o'clock news. Sometimes local cable television stations can provide the necessary expertise.

For news coverage of a school event, publicists should send a press advisory to the radio or TV news assignment editor who, if interested, will put the release in the station's "day book" for future coverage. A follow-up phone call with a reminder a week in advance gives publicists an opportunity to send the advisory again if it didn't make it into the day book the first time. For feature programs, the show's producer is the appropriate person to approach. These programs are usually taped at least six weeks in advance.

Public Affairs Interviews and Talk Shows

Public affairs interviews and talk shows are an important source of free air time. Producers usually are open to suggestions for good topics and articulate guests. A program on high school sports might be done, for instance, with students and coaches as guests. It is best to approach talk show producers first with a letter proposing one or more topics and then with a follow-up phone call after ten days or so. Once interviews are arranged, a memo confirming date, time of guest's arrival at the studio, location and subject matter should be sent to the producer along with a brief biography of the guest and any appropriate background material.

Editorial and Editorial Rebuttal

Broadcast stations that make use of editorials also usually make editorial or rebuttal time available to interested groups or individuals. Radio and television editorializing may be a good platform for bringing others over to the school's position on public policy or an important issue.

School publicists should know which local stations offer editorial time, the length of time allotted, the maximum and minimum number of words necessary and whether the editorial should be done in the studio or taped outside. The publicist should write the copy as succinctly as possible, keeping the audience to be addressed in mind. An articulate spokesperson should be chosen to make the tape; someone whose job, rank or knowledge makes him or her appropriate to comment on the particular issue.

Public Service Announcements

Required by the FCC, broadcasters must set aside a certain amount of time free of charge for public service announcements (PSAs). PSAs must be in the public interest and are usually sponsored by community or nonprofit organizations. Schools might use PSAs to invite the public to an open house, announce a special program or event on campus or give "learning tips" to parents.

Publicists should call the station public affairs director to determine PSA requirements and lead time (usually two weeks). PSAs are usually 20 or 30 seconds in length (about 2.5 words per second, or about 75 words for a 30-second spot). Radio PSAs, to be read by announcers, should be typed in upper case, triple spaced. The PSA sheet should indicate start and stop dates for airing, the number of words in the text and the length of time it takes to read.

For television PSAs, a school can supply a script along with a slide of the school, but a professionally produced videotape with a "voice-over" is much better. Sometimes the TV station will provide its own personnel and studios for PSA production at no charge.

Cable Television

Cable television offers many ways for schools to become known by and be of service to their communities. Local cable companies may, for instance, be interested in cablecasting interesting speakers. ■

Chapter 8

Designing a Marketing Program: One School's Approach

R. Kimball Leiser

Things Our Marketing Assessment Is Telling Us

This marketing assessment interim report was prepared by George School (PA) in January 1984.

About Our Relative Attractiveness (*WHAT makes George School unique?*):

Relative to:	*Some Advantages of George School:*
Good public high schools	Boarding experience, greater participation in team sports and arts, smaller class size, residential faculty, individualized guidance
Most New England schools	Friends' values, balanced learning environment, greater respect for individuality, caring community
Lawrenceville, Hill, Deerfield (all boys)	Similar to the above plus coeducation
Westtown	Tracking, greater emphasis on international programs, outstanding arts program, access to NYC

Purpose

Conduct a marketing assessment of George School and identify a marketing strategy designed to increase the pool of desirable applicants to the school.

About Our Market (*WHO comes to George School?*)

- **Applications** to George School, and to most other leading independent schools, have held up over the past 5 years, despite a decline in the number of students who are of high-school age in the U.S. population.
- However, our **acceptance/applicant ratio** of 65% is higher than the 53% average of 30 independent schools which we recently surveyed and compares with 58% for Westtown and 42% for Lawrenceville.
- Our **enrolled/acceptance ratio** of 68% compares favorably with the 61% survey average, but is made up of a 59% yield of accepted boarders offset by a 90% yield of accepted day students.
- **Friends** are currently 13% of total enrollment and 15% of boarders at George School, compared to 28% and 35% respectively at Westtown.[1] However, day students who are Friends represent 11% at George School, compared to 5% at Germantown Friends, 4% at Friends' Central, 3% at Baltimore Friends and 9% at Sidwell Friends.

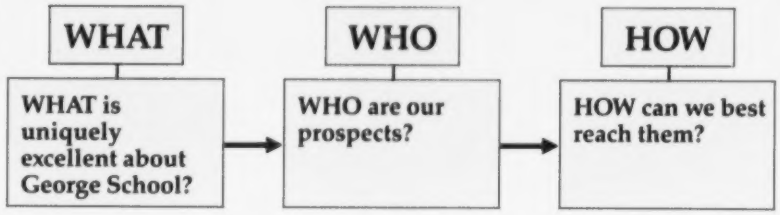
- Twenty-three enrolled **black students** are currently 4% of all George School students, compared to 12% of the U.S. population; **Hispanic-Americans** are 1% of George School students (7% nationally); **Asian-Americans** are 3% at George School (1% nationally).
- Total **minority enrollment** at George School (8.5%) is above the NAIS average (7.5%), but below the 30 surveyed school average (10.5%).
- **Geographically** 84% of our boarding students come from the Middle Atlantic region, compared to 78% at Westtown and 68% at Lawrenceville.
- **Foreign students** (i.e., foreign nationals and Americans residing abroad) represent 3% of our enrollment, compared with 7% at both Westtown and Lawrenceville.
- Twenty-five independent **"feeder" schools** account for about 27% of our new enrollments each year; four Friends' schools alone account for 20% of our new students.
- Thirty-one percent of George School boarders receive **financial aid**, compared to a 33% survey average, 45% for Westtown and 20% at Lawrenceville. However, 29% of our day students receive aid, compared to 18% at Westtown. (At George School, 60% of enrolled Friends receive financial aid.)

About Our Recruitment and Admissions Process *(HOW well do we now communicate?):*

- Parents, students, and alumni (in that order) are the most important first **sources of information** about the school to non-Friends. Friends are also influenced by the opinion of the school held by members of their monthly or yearly meetings.

[1]From its founding in 1799 to 1930, Westtown admitted only Quakers.

The Marketing Assessment Process



- A recent survey of parents of applicants to George School clearly indicates that our **admissions process** is generally held in very high regard by parents of both enrolled students and those who declined our offer.
- **Visiting George School** is the single most important positive influence on a student's decision to come to George School. (The ratio of applications to visits is 92% for George School, 82% average for 30 schools surveyed, and 59% reported by Westtown.)
- While most of the surveyed parents cite the beauty of the campus and value of the student-guided tours, some adverse comments indicate the need to assure the consistent high-quality of **student-led tours** and to be conscious of the daily **appearance** of the school to visitors, particularly dorm rooms, Main hallways, student dress.
- Our correspondence with applicants is of a high quality; we might benefit from more frequent **communication** with inquirers, applicants (relative to the status of their application) and accepted applicants.
- Our evolving **Area Representative Program** has great potential. It combines our best "recruiters" (parents, students and alumni) with our interest in greater geographic diversity and under-represented groups.

Marketing Goals, Objectives, and Programs

Goals for Core Markets
Increase pool of desirable applicants to the school.

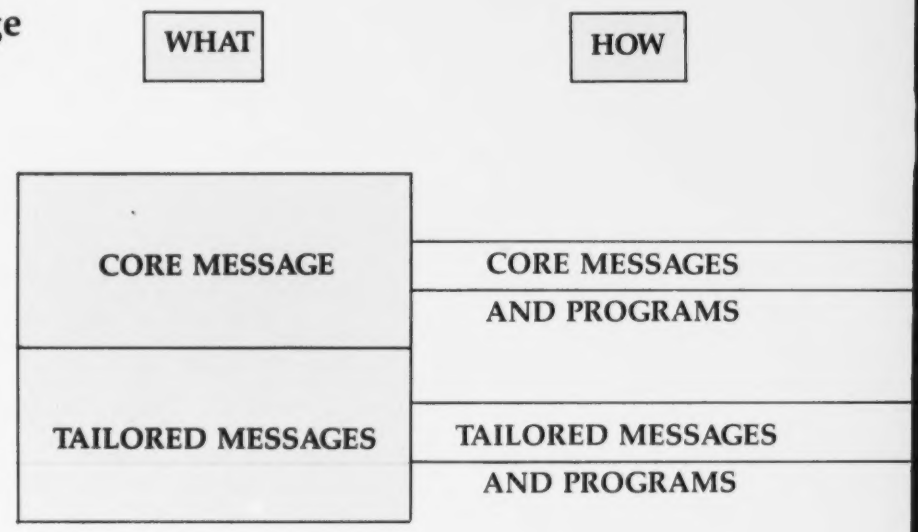
Objectives
(To be achieved by 1986–87)

- Increase the number of inquiries from 1500 to 1700.
- Increase the number of campus visits from 450 to 570.
- Increase total applications from 412 to 510, enabling a 50% acceptance to application ratio.
- Increase yield on accepted boarding candidates from 59% to 65%.

Additional Programs
(To be achieved by 1986–87

- Provide parents, students and alumni with an understanding of their roles as "recruiters"; provide them with current information and material about George School to enable them to speak confidently about the school; facilitate the process of referring interested prospects to the admissions office. A continuing program began in December 1983 with the mailing of the Pennswood/George School article and the science curriculum article to parents, and a select alumni group. Target: two mailings/year generating 20 additional applications.

Marketing in the George School Context



- Catalyze serious consideration of a George School education for their children among alumni through a mailing (December 1983), followed by a letter from the headmaster (March), and selectively by calls from fellow alumni who are present parents (March–May). Repeat annually. Target: 10 additional applications from alumni-related kids.
- Encourage Pennswood residents (350 persons), and those on the Pennswood waiting list (650), to refer their children/grandchildren, as well as other relatives, to George School through a program similar to that for parents, students and alumni (mentioned above). Program began with a mailing in December 1983 to residents; to be followed in February 1984 with a mailing to those on waiting list. Target: 10 additional applications.
- For each of the programs above, follow referrals with a call by the George School area representative.
- Increase frequency of communication with desirable applicants by
  1) one communication (written or telephone) every 4 weeks between receipt of application and notification of the committee's decision on admission,
  2) a telephone call one week following notification of admission,
  3) a letter from current student two weeks following notification of admission, and
  4) a call/visit from area representative during this period.
- Strengthen the program to select and train student tour guides. Periodically review the quality of the tours with each guide.
- Tighten up on appearance of the hallway in Main, dorms and student dress; make faculty more keenly aware of their roles relative to families on a campus visit.
- Provide an audio-visual presentation of the school to catalyze and facilitate the communications task of area representatives and recruiters of under-represented groups, as well as the admissions staff.
- Develop a program to acquaint church groups and community leaders with George School.

Goals for Under-Represented Segments

Friends

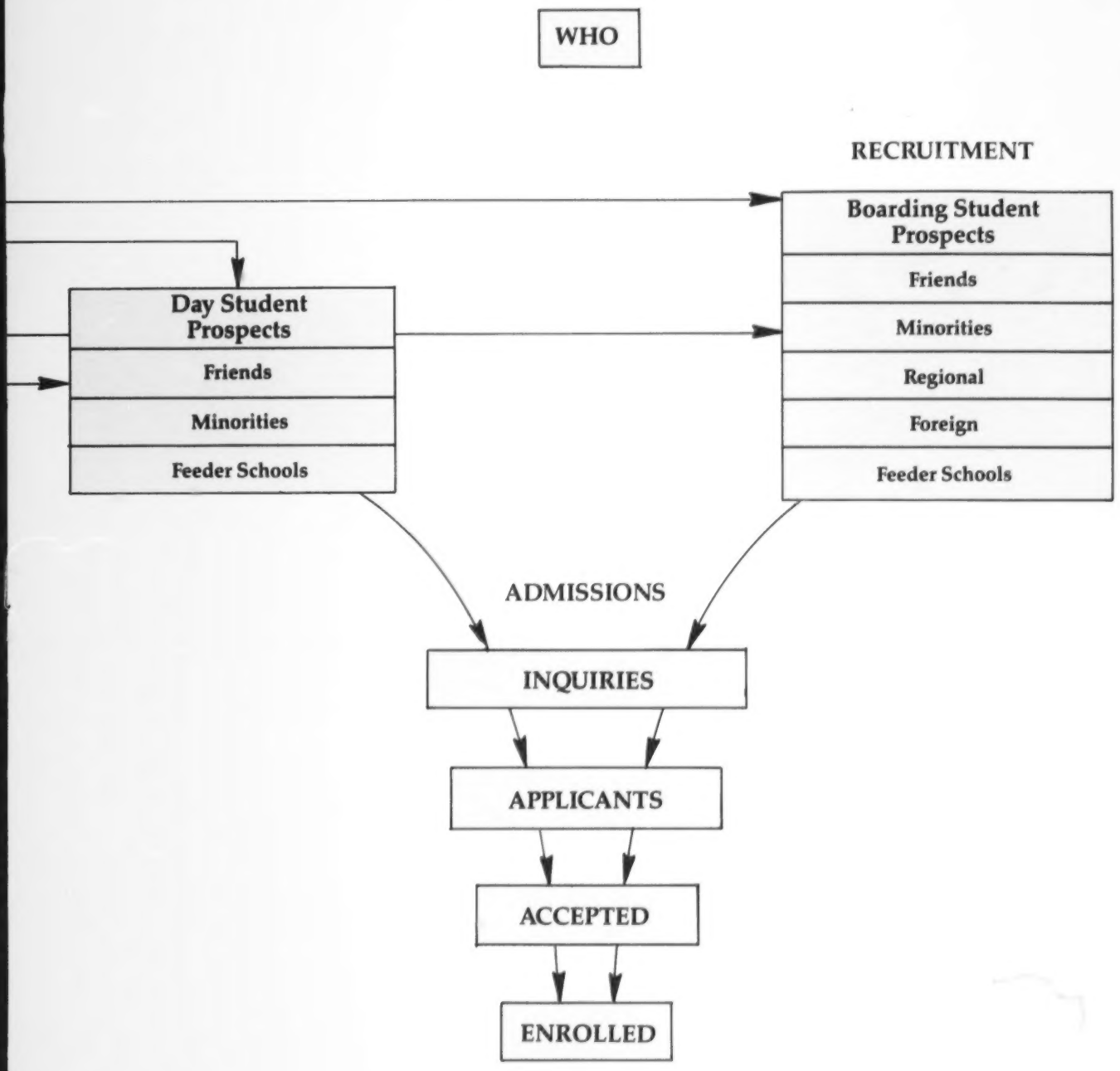
Serve Friends' families and establish a "critical mass" of Friends at George School so as to provide a positive influence on the tone of the school.

Objective

Increase enrolled Friends by 36 students (from 70 to 106), raising Friends from 13% to 20% of the student body. (Time frame to be determined.)

Additional Programs

- Implement a direct mail campaign to Friends who are alumni of the school, informing them of our goals and soliciting their support.
- Develop programs for the Philadelphia and New York Yearly Meetings. (A Clerks' Conference on a "Quaker Boarding Experience" sponsored by George School?)
- Become the boarding alternative for New England Yearly Meeting families, filling the gap left by Moses Brown—program to be developed.



Minorities

In the George School student body reflect the racial and ethnic diversity of the U.S. population.

Objectives

Increase Black-Americans by 40 students (from 23 to 63) to 12% of enrollment; increase Hispanic-Americans by 31 students (from 6 to 37). (Two-year time frame unrealistic; time frame to be determined.)

Additional Programs

- Activate a Minority Parents Task Force (Second Meeting: February 1984).
- Identify and appoint 8 Black and 6 Hispanic area representatives.
- Mount recruitment efforts in the greater Philadelphia, Trenton, Newark and Wilmington areas. Identify a "champion" from each area.
- Develop a catalog supplement geared to Black families; provide a similar supplement in the Spanish language; make available an audio-visual which features both Black and Hispanic students.

Foreign

Support George School's commitment to understanding international issues by increasing the "critical mass" of enrolled foreign nationals, as well as Americans resident abroad.

Objectives

Increase students with foreign residence by 15 students (from 17 to 32) to 6% of enrollment. Increase the number of foreign nationals whose families are currently resident in the U.S. from 3 to 10.

Additional Programs

- Identify and appoint area representatives in key countries; seek one candidate from each country each year.
- Cultivate relationship with the State Department's educational counselor; increase students of State Department families from 10 to 15.
- Tap into the 1,000+ American 9th grade students leaving Saudi Arabia each year; increase our Saudi expatriates from 2 to 5.
- Identify and contact foreign corporations in the NYC/NJ/Philadelphia area, and acquaint them with George School. Start with the companies which employ parents of our present foreign nationa students.

Regional

Increase the geographic diversity of George School's student body.

Objective

Reduce dependence on the Middle Atlantic region for boarders from 84% to 74%, i.e., enroll an additional 29 boarding students from outside this region.

Additional Programs

- Cultivate geographic "pockets" currently represented in student body, such as the "upstate New York college town" pocket. (Visit to NY state in January 1984.) Support this effort with annual recruiting visits, appointment of area representatives.
- Establish new "pockets" in three "nontraditional" geographic areas with an interesting potential for George School: Washington, DC, North Carolina, California.

Feeder Schools

Further cultivate key feeder schools with a view to deepening their understanding and commitment to the school as a logical choice for many of their graduates.

Objectives

Increase new enrollments from the 20 key non-Friends feeder schools from 13 to 25. Increase new enrollments from elementary and secondary Friends' schools from 40 to 50.

Additional Programs

- Step up the program for visiting key non-Friend feeder schools. Communicate with each of these schools four times a year with telephone, newsletter, personal letters. Seek to involve area representatives, as well as present George School students who are alumni of these schools.
- Visit key Friends' schools regularly and communicate at least quarterly. Invite key persons from these schools to visit George School, e.g., hosting a deans' conference.

Some Remaining Tasks

Complete the marketing assessment of *the recruitment and admission process:*

- Better understanding of impact of population trends on applicant pool
- Further analysis of characteristics of present student body, including the "results" of a George School education: test scores, college placement and other measures
- Detailed recommendations on George School publications and plan for systematic mailings to constituent groups
- Understanding of cost and staffing implications of proposed programs; understand the implications for financial aid

Broaden the marketing assessment to include an evaluation of:

- Our communication with current students and their parents—***the parent and student relations process:***
  Are we presently addressing the needs, interests, and expectations of our current "consumers"? What is our image?
- Our communication with alumni, past parents and friends, and our service to them—***the alumni relations process:***
  How can we best become a "lifelong resource" to our alumni, as well as providing for the education of their children, and remaining an institution worthy of their continued financial support?

Articulate George School's "marketing challenge" for the next 3–5 years:

Restate the marketing goals and strategies for
the recruitment and admissions process
the parent and student relations process
the alumni relations process

- Specify what needs to be done in order to accomplish these goals and to position George School securely for the 1990s.
- Determine who is responsible for implementing and managing these programs.■

Marketing Consultants Resource List

The following resources are offered to help schools with their marketing efforts. This list is by no means complete and is intended only to represent the variety of resources available. Inclusion in this list does not imply endorsement by Boarding Schools or the National Association of Independent Schools.

Barton Gillet
10 South Gay St.
Baltimore, MD 21202
301-685-6800
Barton-Gillet pioneered institutional marketing and strategic planning to help secondary schools, universities, medical centers, museums and corporations to better positioning with their key constituencies. They offer complete marketing services.

Browning Associates
24 Clifton Ave., Suite B 2114
Newark, NJ 07104
201-481-1850
This consulting agency provides services in management, general development, annual fund, capital gift programs, deferred gift programs, constituent and public relations, publications, office systems, special educational services.

Carol L. Cheney
45 Trumbull Street
New Haven, CT 06511
203-562-7719
Carol Cheney is a free-lance consultant for schools and other nonprofit institutions needing help on the promotion phase of marketing. Service includes organization and planning; writing, editing, designing publications/advertisements for admission, development and special events; coordination of school corporate identity.

Dalton-Erdmann Enrollment Planners
Herbert F. Dalton, Jr.,
Director, Enrollment Planning,
Middlebury College
David G. Erdmann, Dean of
Admission and Financial Aid,
Rollins College
Box 302 RD 4
Middlebury, VT 05753
802-462-3169
Consultant group to secondary schools and colleges, assisting with admission office audits and market planning.

George Dehne
Admissions Marketing Group
296 Newton St.—Suite 200
Waltham, MA 02154
Admissions Marketing Group provides research, marketing strategies and public relations programs for colleges and universities throughout the nation.

Gehrung Associates University Relations Counselors, Inc.
222 Main Street
Keene, NH 03431
603-352-5300
Gehrung Associates is a specialized communications, marketing and public relations firm that services only educational institutions—schools, colleges and universities—and their various professional associations and organizations.

Gonser, Gerber, Tinker & Stuhr
105 West Madison Street, Suite 402
Chicago, IL 60602
312-263-1433
This consulting firm assists client institutions build and strengthen development programs to obtain greater understanding and acceptance from important constituencies; increased philanthropic support for current operations, capital growth and long-term financial viability; student enrollments of the size and type desired.

Independent School Management
1316 N. Union Street
Wilmington, DE 19806
302-656-4944
ISM is a management support firm which publishes a monthly four-page advisory letter dealing with wide-range independent school management problems; sponsors numerous workshops and seminars; and provides consultation to schools on development, admission and long-range planning issues.

Johnson Associates
800 Roosevelt Road—Suite 17, Bldg. A
Glen Ellyn, IL 60137
312-790-2201
Johnson Associates is a management and marketing consultant firm dealing with nonprofit organizations, namely colleges and universities.

LaVigne Keating Co., Inc.
1 Grafton Common
Grafton, MA 01519
617-839-6958
LaVigne Keating Company is an academic marketing and communication firm. They work closely with schools, colleges and universities to understand their distinctive qualities and marketing objectives in admission, public relations and institutional advancement; they apply creative strategies in building communications programs.

Marketing Sciences Corporation
(A Division of Frank N. Magid Associates, Inc.)
One Research Center
Marion, IA 52302
319-373-2922
Marketing Sciences Corporation specializes in marketing analysis and communications development. The firm offers a full range of research services including focus interviewing, telephone surveys and special advertising and promotion research. Consulting services are available to support admission, development and public relations.

Marketing Sciences, Inc.
Jeffrey T. Wack, Ph.D.
2 Whitney Ave.
New Haven, CT 06510
203-789-1717
The firm provides marketing audits, planning and research to service businesses, including nonprofit institutions. It conducts numerous seminars and workshops on marketing strategies.

Marts and Lundy, Inc.
Meadowlands Corporate Center
1200 Wall Street West
Lyndhurst, NJ 07071
201-460-1660
Marts and Lundy offers a full range of services and techniques, full-time resident direction and/or counseling with client staffs including studies, direction of capital fund-raising programs; counseling on development programs, annual funds; writing and design services for brochures, catalogs; training of new development officers.

New Ventures
666 Broadway, 8th Floor
New York, NY 10012
212-674-0730
This is a nonprofit consulting firm which assists nonprofit organizations to discover, develop or make use of opportunities to earn income. This has been done through developing saleable products or services, royalty and various other arrangements in addition to offering services to individual organizations.

Ransome/Maguire-Enrollment Management for Independent Schools
Whitney Ransome, President
37 Main Street
Concord, MA 01742
617-371-1775
Ransome/Maguire helps schools explore alternatives to traditional enrollment planning and recruitment strategies. Services include: market research, market analysis, recruitment techniques, admission office audits, communications and public relation plans, school image and perception analysis, financial aid and pricing policies.

Sanford Roeser
Box 101
Northfield, MA 01360
413-498-2274
Previously program director of SSATB and the School Scholarship Service, Sandy Roeser has developed an admission counseling service to assess and assist individual school's admission operations.

Rheua Stakely
Box 1093
Exeter, NH 03833
603-778-8349
Rheua Stakely is a consultant for independent school admission and financial aid officers, speciaizing in training of new personnel, improvement of student quality, quantity and retention. She is experienced in publications and publicity and financial aid issues. She offers workshops for administrators, faculty, trustees and students.

Joel S. Strangis
876 Edgewood Court
Lexington, KY 40503
606-231-7676
Former director of admission at Sayre School in Kentucky, Mr. Strangis is an enrollment consultant specializing in advertising.

Boarding Schools
18 Tremont Street
Boston, MA 02108
(617) 723-6900